

## CASE STUDY | A Large Retailer Takes Ownership of their Marketing Operations Management

### CASE STUDY AT A GLANCE

#### Solution Spotlight

Marketing Operations Process  
Optimization and Automation

#### Industry Vertical

Retail

#### Business Challenges

- Need to reduce cost per program
- Need to adhere to program timelines for roll-out to retail stores
- Need to better manage excessive rework
- Lack of data for reporting with little or no visibility of marketing activities
- No mechanism to target inefficiencies and redundancies by business segment and role type
- Complexity and scale (# stores) of the business was increasing, but they could not increase marketing resources

#### Solution Overview

- Developed a “standard work unit” metric to obtain advanced visibility into resource allocation needs
- Implemented a Marketing Operations Management system to automate and streamline workflow
- Created custom dashboards and reports to provide timely visibility into resource bottlenecks and other barriers to meeting deadlines
- Designed “prototypes” with user input for staged roll out of updated system
- Conducted training for 150 users
- Provided on-going support and enhancements for new business processes

A large US retailer needed to bolster their marketing operations to support a rapidly expanding business without commensurate increases in staff or budget so they turned to Pinpoint Systems to help streamline their capabilities for greater scalability and measurability.

**Marketing organizations are continually asked to do more for less** and to tie marketing budgets back to ROI. This sounds straight forward, but for many marketing teams trying to do more with less means that less will get done or worse, deadlines are missed and costly mistakes are made as resources are over extended. In order to stretch already lean marketing budgets, companies must focus on aligning activities with marketing strategies that yield high returns.

Marketing automation, in particular Marketing Operations Management, has long been touted as the way to help marketers work smarter, not harder and to better manage marketing expenditures, while creating visibility on marketing activities to executive management. But even the best marketing automation system cannot support a company’s business objectives if it isn’t properly aligned with the actual needs of the marketing team.

#### The Challenge

A large retail company came to Pinpoint with complex resource management challenges. The marketing organization, with more than 200 employees, included Marketing Strategists, responsible for planning the programs, and a Marketing Operations team that executed those programs—from creating in-store promotions, signage, website content, emails, direct marketing, ad hoc creative and other digital work, all the way through to final production and deployment.

The team had an outdated marketing automation system where user adoption was very low because it was not aligned with their actual work processes. Consequently, the Marketing Operations team had little advanced visibility into the number and type of resources required for upcoming projects. They spent much of their time reacting, which impacted their productivity.

The retailer had the benefit of an internal distribution network, responsible for all product deliveries to each of the 7,000 stores where the company supplies merchandise. The marketing team was charged with using this internal store supply distribution channel for delivery of their printed promotional materials/signage, but the inefficiencies in the resource management often resulted in schedule extensions. Failure to coordinate campaigns with the delivery dates already in place for distribution to any given store location resulted in an excessive amount spent on outside shipping charges.

They also needed to support a business that had grown from 4,000 to 7,000 stores in just three years, without increasing marketing staff, and to find ways for greater efficiencies as the complexity and volume of the marketing programs grew.

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*All of the reports and dashboards were set up to give management insight into project status—at the touch of a button—so that at any given time they know what is in the queue short term or at the macro level. This insight allows the managers to give feedback and input into the marketing plan to determine if it is possible to execute on that plan with the given budget and proposed resources.*

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### Benefits Summary

- Easier to forecast resource needs in advance (up to a year) as soon as the marketing plan is in place
- Greater visibility of marketing activity to key stakeholders
- Able to refine the process on an on-going basis
- Prioritization of activities in a way that aligns completion of projects and materials with schedules for deployment at stores and digital channels
- Greater scalability

### Standard Work Unit

The Standard Work Unit provided a standard metric for the amount of work performed to be viewed across all the types of projects and associated roles to manage resource allocation.

The primary use of the standard metric answered the question, “Given a set of planned projects in a given planning cycle, how many resources of each type will be needed to complete the projects in the planned timeframe (i.e., how many resources are projected)?” The metric addressed the wide variance in complexity and the number and type of project components produced. It helped to automatically translate project requirements into the number and type of resources needed and enabled marketing management to gain visibility into upcoming resource needs rather than reacting to project demands with whatever resources are available and potentially missing scheduled deadlines.

### The Solution

Pinpoint consultants brought to the client their vast experience in utilizing Marketing Operations Management technology to solve marketing management problems in large marketing organizations.

After an initial discovery period where Pinpoint consultants worked closely with key client stakeholders to document the types of projects, workflow, resource allocation and information needed by management, Pinpoint went to work crafting the solution.

- First, standardized roles, such as copywriters, designers, proofreaders, project managers, etc., were established with common responsibilities across the various types of projects.
- Then standard workflows of tasks and approvals were defined for each type of project, by complexity level. The key was to have workflow templates that aligned with actual processes, schedules and resource needs, but not so many templates that standardization within project types was lost.
- Finally, the data was identified that needed to be centrally captured and made available to streamline tasks and approvals and provide insightful reporting.
- To address the resource management need, Pinpoint formulated the concept of standard work units, which enabled the Marketing Operations resource needs for any future or current project to be automatically estimated from the standard specifications provided by the Marketing Strategy team. Key to this estimation process was the foundation of standard roles, standard workflows/ schedules and data describing the project deliverables and complexity.

The solution enabled the marketing operations team to see the resource levels, by role, needed for any future planning horizon—from next week to all of next year. As soon as the Marketing Strategy group entered or updated their plans, the corresponding marketing operations resources required were available at a touch of a button.

This Standard Work Unit was a critical part of the solution to enable marketing management to gain visibility into upcoming resources (see sidebar for more on the Standard Work Unit). The Standard Work Unit estimation model helped the marketing managers to be less “reactive” and to forecast resources with greater visibility into the overall plan. Pinpoint also built reporting and dashboards so management could see what was happening for each project in the queue.

Once the standard metric and new templates with standard roles, tasks, schedules, workflow and data were in place, the implementation and roll-out phase was initiated and users were introduced to the new capabilities. Recognizing that unless the system met the client’s needs there would be poor user adoption, Pinpoint again took a collaborative approach with the team for training and onboarding. They developed an iterative prototype of the system and began with a small universe of users who could “test” the prototype to help identify pain points and make necessary adjustments before the next version was introduced to universe a larger set of users. This approach ensured that the design and the implementation of the system met the client’s needs and expectations.

## About Pinpoint

*Pinpoint Systems helps you realize the promise of real-time marketing to ensure that each of your customer interactions is more intimate and most productive. We intelligently deploy real-time marketing systems and provide EMM software consulting and implementation for Fortune 1000 and mid-market companies.*

*Pinpoint's consultants help you navigate the complexity of real-time, customer-centric marketing interactions, enabling new capabilities that maximize the value and measurability of every customer relationship. Our practical, hands-on approach combines qualitative analysis of your business needs with a deep understanding of data, technologies and tools to help you select, implement and manage real-time marketing systems with confidence and agility.*



*\*Pinpoint Systems is an authorized IBM Unica Reseller and IBM Unica SVP Partner.*

## The Benefits

The client participated in feedback sessions throughout the entire implementation and felt a sense of ownership leading to greater user adoption. The system was aligned with the way the teams worked together yet was normalized to achieve sufficient standardization and provide insight into: assigned resources, deliverables produced, components required, barriers causing schedule delays, amount of time for any given project, and budget and time actually spent.

As soon as the Marketing Strategy team built the marketing plan, it was put into the Marketing Resource Management (MRM) system and the Marketing Operations group could project what was needed for resource utilization at the beginning of each marketing planning period. This information helped the client to target inefficiencies and redundancies by business segment, project type and by type of role in order to establish resource needs as soon as the marketing plan was in place. As the plan evolved, revised estimates were automatically provided by the system so the teams could dynamically adjust to the growing volume and complexity of the workload using the tools within the MRM solution.

As a result of these significantly enhanced resource management capabilities, the Marketing Operations team is better able to meet target in-market schedules and take advantage of the very low cost store distribution network and realize significant savings from far less use of commercial delivery services.

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*Want to explore if the solution Marketing Operations Process Optimization and Automation is right for your business?*

**Learn what Pinpoint Systems can do for you.**

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