CASE STUDY

Organizational effectiveness

We helped our client improve the effectiveness of a complex marketing process

The marketing group had an extremely large mandate

- The group was responsible for multiple channels and brands
- The volume of material was substantial
    - 1,000 unique print pieces per year, with 12M copies printed
    - 1,600 website updates
    - 1,350 other digital tasks (PowerPoints, logos, charts, banners, etc…)
    - Electronic tools such as calculators

SATOV was engaged to both formulate and implement a plan to enable a more effective marketing team

- We performed a thorough review of structures and processes
- We worked with the client team to improve structures and processes in a way that ensured maximum adoption
- We created an implementation roadmap and tracking metrics
- We led the client team through early stages of execution to ease process adoption

We applied set principles to develop our approach

Validate high-level structure and define new mandates	Evaluate and redesign processes where necessary	Decide on and implement processes	Measure performance and drive continuous improvement

**Tasks and deliverables**

• Draft functional mandates for groups • Define the new marketing organization • Ensure role clarity by creating mandates for individual roles • Establish change management plans by position	• Identify all key decisions made by, or impacting the marketing organization • Identify, map and optimize the most important processes • Develop detailed RACI matrices to optimize the decision process and provide role clarity	• Build marketing processes and tools • Reassign responsibilities as required • Acquire any resources/ capabilities necessary	• Define performance metrics including time tracking and service level agreements • Plan regular meetings to review performance and discuss tactical refinements

Guiding principles

- **Communications is an orchestra, not a solo act**
- **All voices need to be heard**
- **Brand consistency reigns**
- **You can't change without addressing culture**
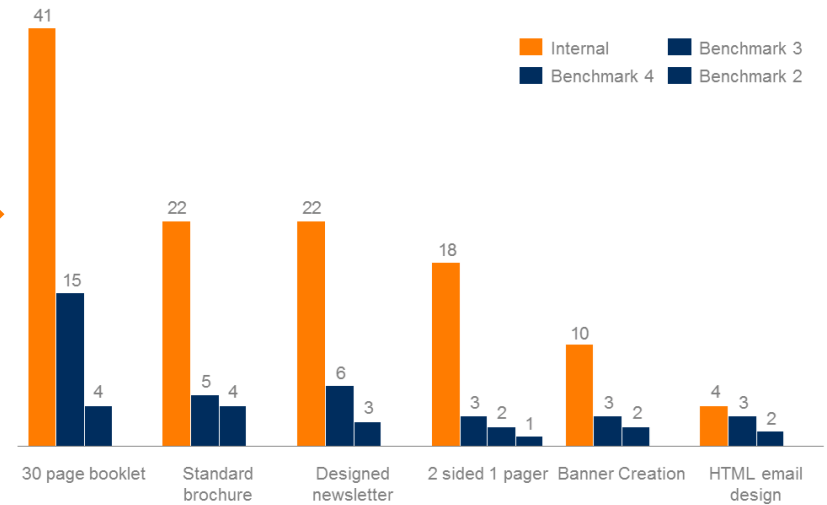- **If you can't measure it, you can't implement it**

We analyzed existing organizational processes

Example marketing process
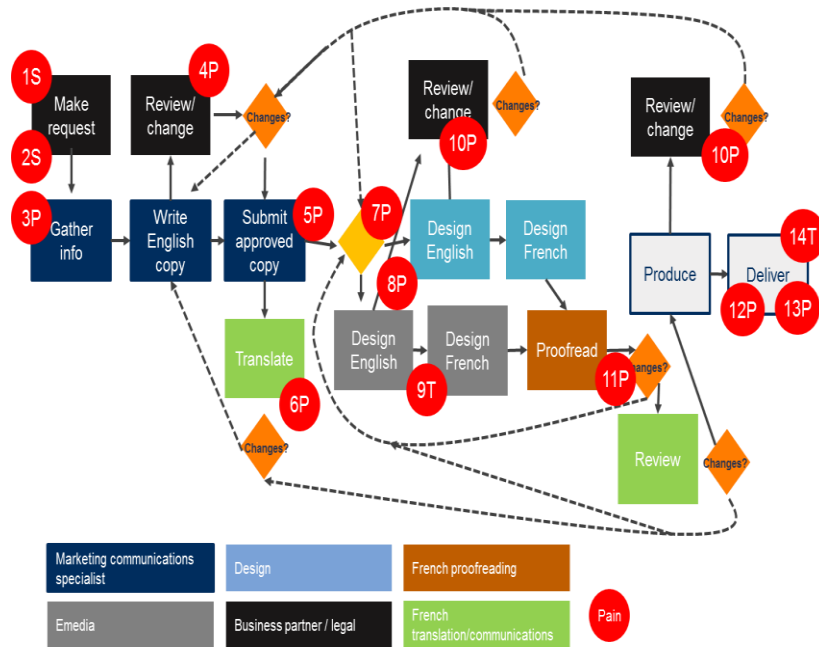
Marketing process time
WORK DAYS TO COMPLETION, 2012

We identified improvement opportunities across multiple drivers of marketing effectiveness
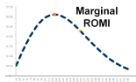
Offer

- Poor organizational links between manufacturing and distribution

Quality

- No mechanism to measure quality of output

Volume

- Excess volume of printed material
- Above the line ad spend potentially below critical mass

Speed

- Speed perceived as inadequate for competitive responses
- Process times well below external benchmarks

Efficiency

- Process times and rework efforts driving up costs
- Inability to justify spend with measures of returns

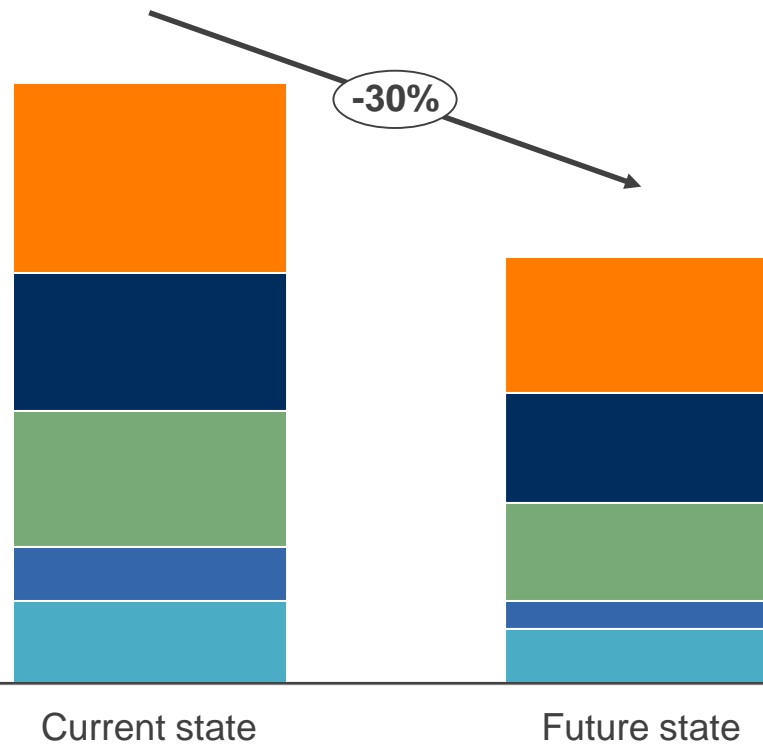# We reorganized into new, distinct marketing organizations

We built a plan to achieve a more efficient structure

Proposed headcount
FTE

Legend:
- Group 1
- Group 2
- Group 3
- Group 4
- Group 5

-30%

Current state

Future state

We developed a portfolio model to improve project management

Portfolio model

Allocated portfolio resources

Portfolio team

As needed resources for initiatives

Portfolio Sponsor

Group 1

Group 2

Group 3

Group 4

Group 5

Initiative 1 Resources

Initiative 2 Resources
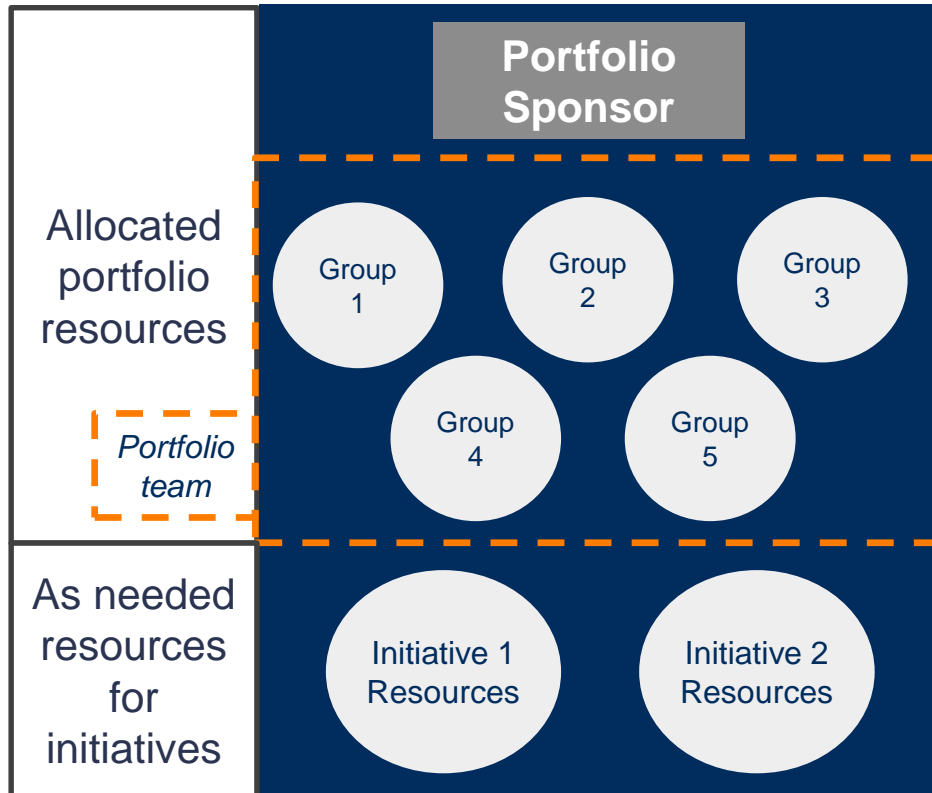
Portfolio resource details

- Provides oversight and thought leadership
- Sets initiative priorities within portfolio

- Validates ideas and recommends priorities
- Assigns project lead
- Develops planning templates
- Requests working team resources as needed
- Manages process and develops content cross functionally throughout project

- Recruited as needed from different functional areas
- Provide input on areas of expertise, and disseminate decisions to their organizations

We outlined important metrics for the organization

	On-time	On-budget		High Quality
Executive leadership	Timeliness	Capacity utilization	Cost efficiency	Quality
Group leadership	By Portfolio By Function By Project By Quarter	By Portfolio By Function By Project By Quarter	By Portfolio By Function By Project	By Function By Project
Functional leadership	By Individual By Milestone	By Individual By Milestone By Source	By Individual	By Individual

Scorecards will be supported with diagnostic reporting to dissect outliers

We developed action plans to drive performance management

Goal	Action
Improve planning	Re-allocate resources across projects and portfolios to deliver on business priorities Plan future resourcing effectively based on timely and accurate information
Drive performance	Use data on success factors to continuously improve over time Train and coach employees to help them improve
Deliver transparency	Re-prioritize work load to focus the teams on highest priority projects for the business Make trade-off decisions in a transparent manner

We designed a system to track performance metric improvements

Flowchart diagram:

Planning tools (dark blue): Initiative Prioritization Matrix, Portfolio Prioritization Matrix → feed into meetings

Meetings (gray):
- Pipeline meeting → How do we allocate resources?
- Weekly Initiatives Meeting → How do we allocate initiatives?
- Portfolio priorities Meeting → How do we prioritise initiatives?
- Initiative team meeting → How much do we invest against which tactics?
- Functional team meetings → How do I organize and coach my team?
- Marketing VP/SVP → How do we make marketing faster?

Measurement tools / Planning tools (right column):
- Portfolio Resource Allocation Matrix
- ClickTime
- External process tracking[1]
- Impression tracking
- # of mailings tracking
- Comm

Output: Marketing Dashboard

Legend:
- Planning tools
- Measurement tools
- Decisions