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A MARKETING GEEK'S GUIDE TO:

CENTER OF EXCELLENCE

A MARKETING GEEK'S GUIDE

ABOUT THIS SERIES

Modern marketing is a tough game, and one that takes reflection, growth and clear organization. When your company is set up for marketing excellence, the possibilities are limitless.

That's where this eBook comes in. A Center of Excellence really is exactly what it sounds like, a powerful tool in the center of your organization that ensures your marketing and sales teams have the tools and operations for excellence. At Relationship One, our mission is to "Inspire Success." We hope that reading through this eBook will inspire you to try something new, solve a problem you've been dealing with, or invent something that will take your marketing efforts to the next level.

Let our experts help you dive into an area of modern marketing that you're curious about and let the inspiration flood in.

A MARKETING GEEKS GUIDE:

CENTER OF EXCELLENCE

Center of Excellence (COE) may be a term you see often, but may question how to best start or manage one in your organization. So, what is a Center of Excellence? Why is it important and where do you even begin to create one in your organization? That's where Relationship One's eBooks come in. We organized a few of our best blogs about building your case for a Center of Excellence and how to manage the inevitable change in your organization. So kick back, relax, and get your best reading glasses ready. Let's check in with our experts!

CHAPTER 1:

WHAT IS IT AND WHY IS IT IMPORTANT?

Center of Excellence. A clear and obvious term, right? Take a moment to google and very little meaningful information will be provided, nor how or why it applies to you. Yet the phrase keeps surfacing, amidst other buzzwords such as artificial intelligence and intent monitoring. So what is it and why should you care? Glad you asked.

A Center of Excellence or COE (or CoE) is a team, shared facility or entity that provides leadership, best practices, research, support and/or training for a focus area. In our arena, it's frequently a Marketing CoE.

Before we dive into the definition of a CoE, let's discuss what a CoE is not. It is not a steering committee, who's focus should be on the strategic priorities of the business and therefore the overarching direction of its operations. Nor is it a demand center, which is a central and/or regional hub of shared marketing services, infrastructure and processes. Think of the demand center as the operational arm for what the CoE develops and implements.

Typically, there is a gap between the strategic planning and decisions made by executive leadership and the teams that will operationalize those decisions. We're sure you've all seen that play out in your world. The CoE solves for this gap, especially as the technology stack grows but the structures and processes currently in place can't enable and support it. Additionally, the CoE addresses one of the issues that is all too common, which is the transition from deployment to implementation and adoption. The CoE is not only involved in the building of these processes, but also owns the management and ongoing progression of them.

At Relationship One, we typically see the following functions fall to the CoE team:

- **Best Practices** – provide support and direction on organizational change management, standardized approaches/processes, tools, methodologies and knowledge centers.
- **Support** – deliver shared services, policies, training, templates, communications, etc.
- **Measurement** – define marketing performance measurement (MRM) approach, analyze marketing results and CoE ROI.
- **Training** – provide skills assessments, e-learning curriculum, classroom training, certification programs, etc.
- **Technology** – technology/systems standardization, integration standardization, vendor management.
- **Governance** – provide oversight on marketing technology access, usage, performance management, integration management, data management, utilization, etc.

Looks great, right? Yes, but it requires a shift from how we do things today, one that requires creating roles and functions or ensuring better interdepartmental functions in an organizational structure that doesn't currently support it; or more often, isn't aware that there is even a need.

For that, it requires the visibility and sponsorship of your leadership team, and a plan. Creating something from nothing, especially in an enterprise environment, takes both. But for our clients who have implemented them, it pays overwhelming dividends and has provided our team the evidence that the "CoE" as a term and a function will soon become as familiar as any others in our organizations.

CHAPTER 2:
BUILDING YOUR CASE

Are you looking to understand how to implement a Center of Excellence (CoE)? Perhaps your organization has reached a critical point and you need stronger governance and best practice guidance. Maybe you're migrating or integrating a number of business units and/or regions into Eloqua and your organizational structure/accountability needs to change. Or maybe the last chapter just made you intrigued to know more. Either way, you know what a Center of Excellence is and why it's important, and now you are asking: how on earth do you implement one? In the previous chapter, we highlighted that success is contingent on the sponsorship of your executive team, and a plan. In this one, we begin the process to address both.

CoEs have a common structure and similar functions (phew!), but the real challenge is managing change. It's critical that we've identified the right path to fulfill the unique requirements of your business and solve for the problems that highlighted the need for a CoE in the first place. Our first step in building a CoE is to build your business case for needing one. We need to communicate to key stakeholders what problems the CoE will solve and how the organization will benefit. So let's begin this discovery and set the foundation for your planning.

STEP 1: ASSESSMENT

First, in order to make change, you have to understand where you're at. And you might be surprised (okay, maybe not) with the lack of visibility in what the organizational structure and current processes look like today. Start with the following questions; these can be in the form of stakeholder interviews, surveys, workshops, etc.

- How is the business structured at a high-level?
- Is there a product owner or team of administrators?
- Do you have a centralized or decentralized model?
- Do you leverage a demand center?
- Do you partner with agencies?
- What's the regional variability of your teams (number of headcount, overlap of roles, use of agencies)?
- What's the chain of command, or how are the teams dependent on one another?
- What are the common processes that occur?
- Are they defined and known across these teams?

You'll likely need to reach out to several types of team members to gather the above information. Some places to start are your executive team, steering committees, central marketing (demand creation and ops), your regional leads, and heads of other functional departments, such as sales, IT, or field marketing.

Once you do this, you may balk at what you "didn't know that you didn't know." You're not alone. In dealing with the pace of our industry and the resulting changes to keep up with it, this can often result in individuals wearing 12 different hats, a mixed bag of agencies, inconsistent or unknown processes, or an assortment of missing roles or people in the wrong ones. All are incredibly common, but also what we aim to fix.

STEP 2: VISION

Now that you understand where you are (and have it fully documented out, right?), let's look at where you're going. What is the known roadmap for your:

- **Marketing strategy** – Those annual marketing plans, what was defined? How about go-to-market strategy and planned campaigns? Or maybe you're tackling Account-Based Marketing (ABM)? Essentially, what is the roadmap in the coming year, or years, ahead? This will impact your marketing teams and how the CoE can sufficiently support them.
- **Technology stack** – There is always technology being added, removed, changed, or migrated. What does that look like for you? Often this will align to the above strategies such as a predictive or intent monitoring vendor for ABM or a data management platform (DMP) to aggregate, analyze, and support your other

technologies, but this could also be a migration to a unified CRM, for example. Knowing these changes will help determine where resources will be needed for these technologies, as well as the process and change management efforts to ensure their success.

- **Organizational changes** – We've spent a fair amount of time understanding how everyone is structured today, but if there has been a recent acquisition or an upcoming reorganization, we'll need to account for them.

You don't want to create a CoE just to address the current state and problems of today, but to align and support where you're going as a company.

STEP 3: ANALYSIS

You just gathered a lot of data, so now it's time to do some digging to determine:

- **What's working well today?** Who can you potentially model? This not only gives you a template or place to start but supplies proof of success when you begin presenting your findings and proposing a recommended approach.
- **What's not [working well]?** This will be lengthy, but don't shy away from it. The problems are there regardless if they've been identified, but in doing so, they can finally be addressed.
- **Where are the gaps?** Based upon where you are and where you're headed, what are the issues, risks, and limitations that you need to account for?

This process has several other benefits as well: when presented, you show people they've been heard and understand both their wins and the problem(s) they've been dealing with; you're amassing evidence for the need to change; and when implementing this eventual plan, you'll know you're on track when it begins to address the issues, one after another.

STEP 4: BUILD YOUR CASE

It's time to build your case by summarizing where you're at, acknowledge where the company is heading, identify what's in your way, and outline how the functions of a Center of Excellence can solve, or serve as the catalyst for solving them. This then becomes a critical component in building out the plan.

Congratulations! You've now done the homework to overcome one of the greatest barriers to success, one that would stop you before you start: communicating the need and getting buy-in from senior leadership. Implementing a CoE requires substantial change, to both people and the processes they effect, and therefore requires a top-down approach. In the next chapter, get some tools for helping manage change and feel better equipped to get advocacy and support from your executive team.

CHAPTER 3:

FIVE KEYS TO MANAGING CHANGE

Whether you're managing a modern marketing transformation, rolling out a new lead flow process, or simply re-painting your office, change comes with difficulty. No matter how great the vision, how fantastic the plan, or how awesome the paint, change is HARD. Any change you implement will be wrought with challenges. Despite the adversity, as long as you remember that obstacles are not roadblocks, you can and will succeed. With a clear vision and a strong set of tactics for managing change, you will effectively get where you're going.

As consultants in the marketing technology space, we have managed countless change initiatives. Whether you call them transformations, transitions, restructures, revisions, or enhancements, your constituents will hear one thing – change. And whenever there is change, people get scared, annoyed, frustrated, and everything in between.

Change management remains a hot topic in the business world. Countless books, resources, and college courses are dedicated to it. Although there are many sound approaches, here are five key actions that we've seen make a huge difference when rolling out change in any organization.

HAVE A ROADMAP

You need a vision. You need to know exactly where you want to go and what you want to accomplish. The most important part of your vision is the ability to spread your passion so others, specifically your key stakeholders, believe in it as equally as you. How will this change positively impact them and the company? What will you/they/the business gain from this change? The key is sharing the WIIFM (What's In It For Me?). Never underestimate the power of connecting the dots for each person involved. Tell them exactly how they will benefit.

As important as vision is to the success of your initiative, you will fail without a detailed plan. Before embarking on any initiative, clearly document what you plan to accomplish. You need to explain, in detail, your objectives, milestones, actions, resources, timeline, metrics, etc. Keep in mind, you won't have it all worked out. Consider this plan a roadmap for how you will get to where you need to be. The final plans won't be possible until you've done your due diligence in discovery with key stakeholders.

As part of your planning, list any and all potential issues and bottlenecks, and devise alternative solutions if these problems arise. Don't wait for issues or objections to be brought to your attention. Have your own objection-handling guide so you're prepared in advance.

KNOW YOUR STAKEHOLDERS

Although you are leading the project, you cannot succeed without buy-in and support from everyone affected by the change. Your initial goal is to share your vision and objectives with all key stakeholders, but you'll need their insight, ideas, and support to add perspective to your plans. As you draft your initial roadmap, list all key stakeholders. Who will be affected by this change? Who will benefit? Who will need to execute certain parts of the process? You may find it easier to categorize individuals by function, level in the organization, business unit, product line, etc. to structure your thinking.

Once you have your list of stakeholders, make a note of which ones may serve as internal champions. You'll want to spend extra time securing their buy-in so they can spread their support for your undertaking. Once identified, draft personas for these key individuals. Define their current role, proposed role, required process changes, etc. Document their needs, challenges, desires, and potential objectives. Keep in mind that much of this information will require conversations and interviews with these individuals.

The reason for drafting personas is two-fold:

1. It will ensure that your process and plan address the needs of all stakeholders as well as the organization. One person can't know it all. Take the time to learn from others so your plan will be that much stronger.
2. When you include key stakeholders in the planning process, you're naturally acquiring their buy-in. They will be much more supportive when they've

played a role in the development. When their needs have been addressed and their concerns have been taken into account, an individual's participation and adoption is much higher. Remember, the more they see the WIIFM, the more they will buy in.

CONDUCT LOTS OF TRAINING

Now that you've developed your roadmap, gone through discovery with your stakeholders, and finalized your detailed plan of action, your next key step is training. Everyone involved in the process needs to understand their role, their importance, and of course, what's in it for them. They also need to understand the details behind execution. Review the overall plan, expectations, and goals with the entire team. Each individual should get detailed training on every step of the process. In some cases, an SLA may be required. In others, detailed documentation and consistent reviews will suffice.

As part of your training, be clear about the feedback loop you're implementing. Everyone should know how, when, and to whom they should ask questions. Make sure to include opportunities for them to share what's working and what's not. In some cases, like with a formal SLA, this will be clear. In others, it may not be as obvious. Take it upon yourself to remove ambiguity in the process. Ensuring there is an open and continuous feedback loop is imperative for the success of your program.

Don't forget to follow-up regularly to ensure the process is being followed and that no questions have arisen.

GET SOME QUICK WINS

It's always important to think long-term, but it's equally important to get some quick wins. Don't try to boil the ocean. Look for short-term successes that can be felt throughout the organization. Maybe you can tackle a campaign, automate a difficult process, or streamline an old process to show value right away. It's easier for people to get on board when they see the WIIFM quickly.

Once your plan is developed, break long-term goals into milestones. Break your milestones into short-term goals. Break your short-term goals into actions. Break your actions into tasks. You get the idea. The goal is to make your long-term goals as tangible as possible. Design your short-term actions so that each one has a measure of success that people can feel.

Most importantly, celebrate success! Especially in the beginning, celebrate every win, every efficiency gain, every conversion, every everything. Highlight how Mary from Sales or Joe from Customer Service or Luke from Marketing contributed to the success. Reinforce your message, your process, and your people whenever you publicize results to the organization. Gain traction quickly so you can really take flight.

COMMUNICATE, COMMUNICATE, COMMUNICATE

At the essence of each point iterated is the notion that you have to communicate. At each stage of the process, you need to communicate results, changes, enhancements, growth plans, etc. Communication does not stop after rollout. In fact, it is just beginning.

Devise a clear communication plan up front. Consider each stakeholder and what he/she needs and wants to know. In the spirit of marketing automation, personalize your communication to each persona. Don't send the same message to everyone. Communicate what matters most to each individual. Consider various modes of communication as well. How and when you deliver the message can be equally as important as what you deliver. Different individuals may need to hear your communication at different times and in different ways. Include these variations in your plan.

As you develop your messaging, keep in mind that you will continue to have stakeholders at various phases along the adoption curve. Some will be champions, some will be laggards, and the rest will fall along the spectrum. Craft your message knowing that each individual needs to hear various messages – congratulations on successes, deeper explanations of WIIFM, potential solutions to current challenges, etc.

In your communication plan, include the recipients of your message, their potential adoption rate, pertinent messaging, channels of communication, timing, etc. Detail as much as possible so that you're in a better position to continue your communication over the long term.

MAKE WAY FOR CHANGE!

Any new initiative is hard. Change can be great, but it is also difficult. It's easier to keep the status quo than to change, but if you keep doing the same thing, you'll always get the same results. Change is vital to the health of any organization and, frankly, any individual. It will not be an easy road, but if you craft a clear vision, include your stakeholders, train abundanty, get your quick wins, and communicate, you'll set the foundation for success.

WRAPPING THINGS UP

Are you feeling excellent? Now that you're fully versed in what a Center of Excellence is and why it is important, you can be confident in building your case for one and managing change in your organization. Thank you, Marketing Geeks!

It's been our pleasure to guide you. If you're working on a strategy for a Center of Excellence and need support, please contact us. We love setting companies up for success!