



Marketing transformation consulting delivers cost savings and a consistent pipeline

THE CHALLENGE

In 2019, Marketri was contacted by a professional services firm that had a relatively large internal marketing department and spend for its size. Despite its sizable investment in marketing, the team was not moving the needle as expected, and the firm needed an outside perspective to solve its two biggest challenges.

1. The marketing department was operating as a cost center.

In general, marketing was more reactive and task-driven as opposed to strategic and results-driven. Not only did this affect the company's growth goals, but overall firm satisfaction with the department's efforts was low. Leadership recognized a change was needed.

2. The firm had a great story but struggled to tell it.

Between its two lines of business—management consulting and investment banking (each with its own priority sectors and service lines)—and its parent brand, it was difficult to explain the business and communicate its key differentiators and value proposition.

OUR APPROACH

Transforming marketing to a strategy-led department

Early on in our engagement with our client, we learned that "do no harm" was a primary expectation for the marketing team. Marketing was considered successful when it did not negatively affect the brand or confuse prospects or customers. This reflected a lack of trust caused by inconsistent performance levels and processes and positioned the department as a cost center.

Our approach was to right-size the investment in marketing talent and transform the department to being strategy-led. Marketri performed a deep-dive of business goals and priorities in order to hire for ongoing success and put the processes and technologies in place to ensure long-term execution of strategic goals.

AT A GLANCE

Industry

Professional Services
Investment Banking
Management Consulting

About

The firm's investment banking and management consulting divisions comprise multiple services and sectors, from chemicals to construction materials to clean energy solutions.

Partners From

2019 - 2021

Notable Results

Optimized department structure

To significantly reduce marketing spend and redirect resources to high-value add activities

Developed a predictable lead generation model

633 new leads in Q1 2021 from gated content alone

Launched successful and streamlined corporate rebrand

MARKETING TRANSFORMATION PROCESS

Our marketing transformation consultants always start by understanding client goals and assessing the current state of the marketing function. We then develop a strategic roadmap complete with recommendations around talent, technology, target market, and key processes that map to company goals.

- **Goals and Planning**

At Marketri, we believe strategy always comes first.

We helped our client determine and define growth and revenue goals so that decisions about what skills should be in-house vs. outsourced are clear.

- **Current State Assessment**

We leverage current resources to the extent possible while incorporating new processes, people, and technologies to move the business forward.

Marketri evaluated hard and soft skills, assessed the department's technology stack, and audited existing processes for marketing activities.

- **Execution & Measurement**

Marketing transformation is unique to every company. Marketri helps to hire new employees, implement new technologies, rebrand the firm, develop new websites, and provide overall strategic leadership.

For this engagement, we moved the CRM from Marketo to Hubspot to gain efficiency and cost savings, hired talent to fit the strategy, and leveraged the firm's significant investment in thought leadership.

MARKETING TRANSFORMATION

Following our assessment, Marketri helped to hire talent to fit the strategic needs of the firm. One of the company's longest term marketing employees was promoted to Director of Strategy and three additional key positions were held in-house. Marketri helped fill talent gaps with its fractional marketing directors and managers.



Marketing Director



Marketing Manager



Graphic Designer



Marketing Liaison



marketri 

With its new lean, agile, and high-performing team, the marketing department operated from a strategy-first perspective and achieved tremendous results:

- Developed a comprehensive marketing strategy and plan to guide a more proactive approach.
- Gated content to increase conversion rates and build a lead generation engine.
- Transformed marketing operations to remove roadblocks and restore department trust.
- Implemented new marketing technologies like Hubspot to track leads and measure results.
- Developed a new visual brand and compelling brand messaging.



"Thank you, Marketri! I really feel that we are on an exciting marketing path thanks to all your hard work and professional expertise. My colleagues see real changes in the marketing department's direction, which is much more strategic. Rather than fielding a bunch of requests and putting out fires, we're focused."

Director, Marketing Strategy & Insights

Schedule a free consultation to learn how Marketri can transform your marketing department.

[Schedule a Call](#)