



B2B Strategic Marketing for the Digital World

# Guide to Structuring Your Marketing Department

THE PROCESSES AND CONSIDERATIONS BEHIND  
ESTABLISHING AN EFFECTIVE MARKETING TEAM

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# Introduction

Your professional services firm decided to harness the power of marketing to grow your firm. That's a big first step towards future growth – congratulations! Okay, now what do you do? If you're not a marketing professional, the path forward can be confusing as there are no cookie cutter, off-the-shelf solutions. (If a vendor tells you that there are, and they have the right one - RUN!) Marketing departments come in all shapes and sizes. Some firms employ one person and embrace a "one-size-fits-all" approach. Others outsource the entire function to external marketing firms. There is no secret formula to building a marketing department dream team.

Marketri's **Guide to Effectively Structuring Your Marketing Department** will provide you the basics you'll need to get started, such as:

- What goals might the marketing function within an organization have?
- How does it integrate with the sales function and why must they work together?
- What are typical marketing activities and how do they compare to sales tasks?

With this marketing background, you will be ready for the next step and dig deeper. Marketing is a highly complex field with many areas of specialty. We'll help you assess the different marketing structures available to your firm and review their pros and cons. There are many factors that will play into which structure is right for your firm. If the structure is optimal, a firm will usually see a favorable return on its investment in marketing; if the structure doesn't fit, marketing is simply overhead.

This guide will not provide you with the secret formula but give you a framework for making an informed decision today. Keep in mind, the structure that is right for you today may be different years down the road. The marketing function in an organization should evolve as the company changes. Are you ready to get started?

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# Part I: The Basics of Marketing

## Why Embrace Marketing?

So before structuring your marketing department, you'll need to have a solid understand of what marketing is and to be honest, why bother? Here are some reasons why you should care.

An effective marketing function will:

- Discover what customers want
- Hone products and/or services to align with customer needs
- Maintain a professional image for your firm
- Maintain consistent touches within your client base
- Generate leads though a wide range of tactics, collateral and campaigns

## What Does Marketing Do?

Depending on the goals of your organization, your marketing person or department may perform some or all of the following.

- Marketing Planning
- Identifying Segments
- Positioning the Firm to Stand Out
- Blogging / Content Marketing
- Social Media Marketing
- Advertising
- Graphic Design for Print Collateral
- Developing and Maintaining the Firm Website
- E-mail Marketing
- Proposal Development
- Educational Presentations



## **How Does Marketing Relate to Sales?**

Marketing and sales (or business development) are sometimes thought of as the same thing within a professional services environment, but they are different. The marketing function supports the sales function by making it easier for the professional / sales person to approach a client, who by having been exposed to the company's products and services (the result of brand awareness), is both less resistant to engaging with a sales person (or a professional) and more informed as to the firm and service being offered.

Depending on the goals of your organization, your sales person or department may perform some or all of the following:

- Cold Calling
- Networking
- One-on-One Meetings
- Sales Presentations
- Nurturing Prospects
- Managing Contacts

## **The Importance of Marketing and Sales Working Together**

It's crucial for any professional services firm to strike a balance between marketing and sales. While each function is separate, they must work together to maintain existing clients and generate and close new business. What happens when there's more of one function than the other?

### **Sales Without Marketing**

Without marketing, prospects will have little or no knowledge of your firm, which makes getting an initial meeting challenging and closing the deal extremely difficult. They don't know much about you. You don't know much about them. There's a higher probability that it's going to be a bad meeting and a waste of time. Trying to get wins by sheer volume is a wasteful approach. The goal of marketing is to prevent you from these misguided exercises and increase the chances of successful meetings by getting your leads and prospects to know you better ahead of time.

### **Marketing Without Sales**

The marketing function can pull leads into the sales funnel and nurture prospects for a period of time. In professional services, however, it will almost always take that personal touch to convince a prospect of the right choice and close the business. If you embrace marketing but have no sales, the result will be high brand awareness but low ROI.

### **Leverage Marketing and Sales Together**

The right formula is to have marketing warming up the market, touching prospects, gaining their trust and interest and then having professionals working on building solid one-on-one relationships. People do business with people they know, like and trust. All the marketing in the world won't replace that.

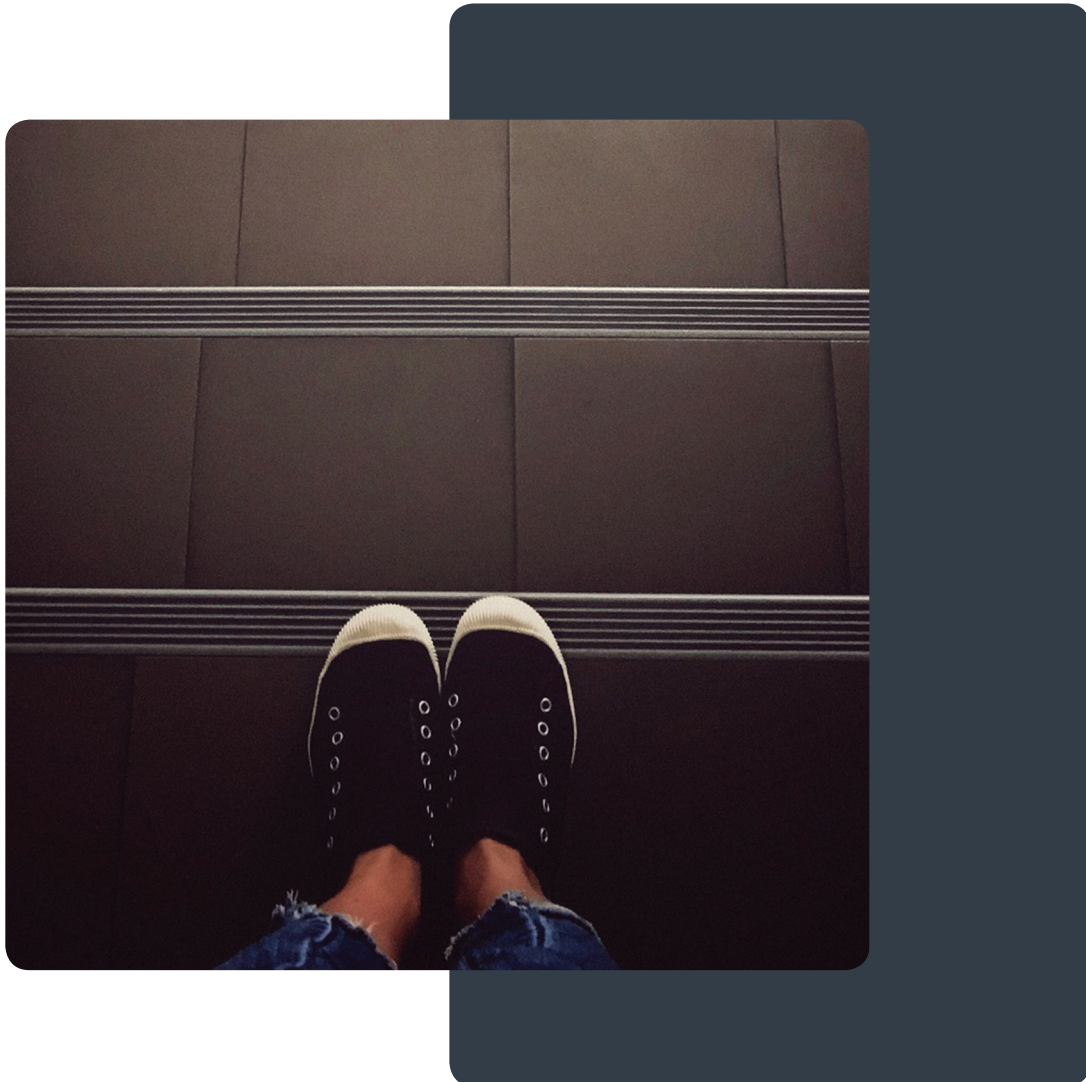
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## Part II: Marketing in the Modern Era

Before the Internet, the power of the sales process rested with the seller. Buyers received information about products and services through advertisements, public relations, commercials, etc. Now, buyers have all of the information they need to make informed decisions at their fingertips, and they cull their intelligence from a wide range of sources, many of which are online. That makes the job of the modern marketer exceptionally challenging. Effective marketers need to have the right information at the right time in the right place. There are many tools and platforms available to assist with this process, but which to choose and how much and little to use them is a question mark for many marketers. The marketing world is complex as shown in the graphic on the following page:

### Marketing's Complexity is Growing

Marketing, with all its complexity, is a challenging position to staff regardless of whether it's in-house or outsourced. Non-marketing professionals trying to build a marketing team are left shooting in the dark unless they get more informed and start asking the right questions.



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## Part III: Marketing Considerations

Now that you have some background in Marketing and understand that it's a complex field, we are ready to start building your marketing function step by step. By following each of these steps and not taking any shortcuts, you and your fellow firm colleagues will feel empowered and able to confidently structure your marketing departments to carry out your firm's strategic vision and achieve desired outcomes.

### Step One: Marketing Commitment

You may be very committed to leveraging the power of marketing, but what is your firm's commitment? Is your firm only willing to dip its toe into the marketing pool, or is it diving right in? Some of the signs that your firm is ready to go "all in" include:

- It has formed a marketing committee.
- It has allocated a budget for marketing that is somewhere between 2-5% of revenue.
- It has and will encourage professionals to do marketing, and not just when they have a light client load.

### Step Two: Driving Factors

There are many other considerations when structuring your marketing department, and they contribute to the type of marketer and level of experience your firm will require.

#### A) Size of Your Firm

An important consideration in how you structure your marketing department is the size of your firm, including:

- Number of practice groups
- Number of target sectors / industries
- Number of offices (geographic spread)

The larger the firm, the more it will need a marketer with experience to lead the charge and support from a wide range of marketing specialists.

#### B) Growth Objectives

What are your firm's growth objectives? The more aggressive they are, the more of an investment you will need in marketing.

#### C) Competition

How competitive are the target markets in which you are competing? The heavier the competition, the more you will need marketing experience and a resourceful, aggressive team.

The combination of these considerations may dictate different approaches. For example, if your professional services firm expects 20% growth and has four offices in different geographies, it might make sense to have a few in-house marketers in its different locations and outsource certain aspects of marketing.

If your firm is lower-middle market with one office and modest growth objectives, you may need one in-house marketing generalist, or might be better served by outsourcing the entire marketing function.

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## Part IV: Selecting the Marketing Team Structure

Your answers to the considerations addressed above will drive which structure is the best fit for your firm. Let's take a look at some different marketing department models and the pros and cons of each.

### Three Options

**Option 1:** Have an **in-house** marketing professional or department, where their sole focus is squarely on your firm.

**Option 2: Outsource** the entire function to a third-party marketing provider.

**Option 3:** Have one or more in-house marketing employees, while also partnering with an outside marketing company to round out skill sets needed. This is known as a **hybrid** model.

### Pros and Cons

Pros and cons of each model can assist you in narrowing down your options:

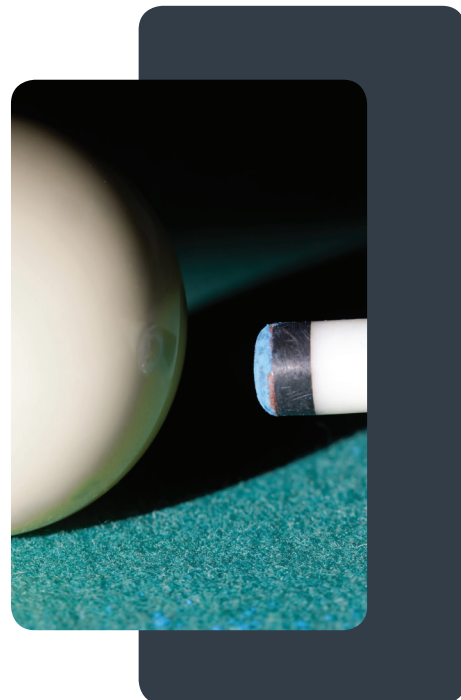
#### In-house marketing model

**Pros:**

- Dedicated resource
- Knows company culture
- Perception of being more accessible
- Fixed overhead (no budget surprises)

**Cons:**

- Fixed overhead (pay whether you use or not)
- Lack of career advancement / high turnover
- Jack of all trades, master of none
- Can be too senior or too junior
- Difficulty in keeping up with best practices



## **Outsourced marketing model**

### **Pros:**

- Variable cost (scale up or down)
- Typically current with best practices
- Tap specialists as needed
- Viewed as an “expert”
- No worries about mentoring / career advancement

### **Cons:**

- Variable cost (more difficult to budget)
- Lack of face-to-face accessibility
- Not as in touch with company culture
- Perceived lack of control

## **Hybrid marketing model**

### **Pros:**

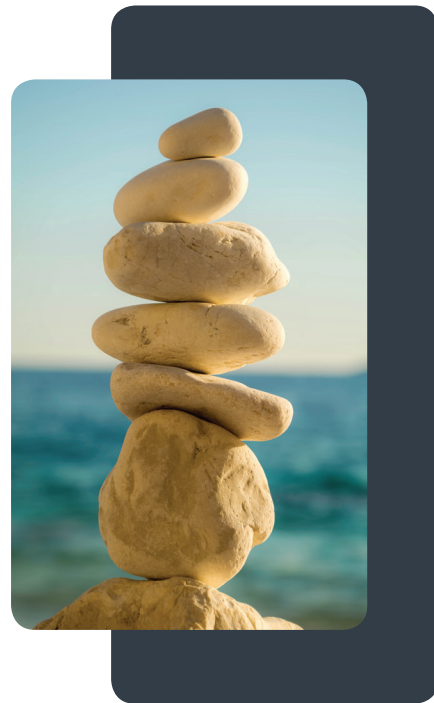
- Balance between fixed and variable costs
- Current with best practices
- Tap specialists as needed
- Scale up as needed
- Easier for outside firm to navigate internally
- Maintain accessibility and more control
- In-house marketer can be mentored

### **Cons:**

- Role confusion between in-house department and outsourced firm
- Cost structure high for smaller companies

Whichever model you decide is right for your firm now, keep in mind that the marketing structure might change over time as your firm evolves. While there is no right or wrong or science to structuring the marketing department, the graph below reflects some observations we have made throughout the years.

The smaller firm with less aggressive growth objectives will tend to have one in-house marketer at a more junior level. A firm “on-the-move” will usually tend to outsource marketing, as they need to tap an experienced marketer to lead the charge but likely can’t afford his/her full-time salary. It also needs to use its marketing resources wisely and outsourced firms have best practices and streamlined processes. Once a firm reaches a certain size and scale, the hybrid model works quite well by bringing the more general tactical marketing execution in-house and outsourcing strategy and specialty areas of marketing. And finally, once a firm gets to be a certain size and scale, bringing most of the marketing in-house tends to be the most cost-effective way to move forward.





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## Part V: Ready, Set, Go!

We have some final pointers for you as you look to build your marketing department.

### **In-House Marketer Hiring Considerations**

Marketers come in all shapes and sizes, with some being strategic and others being more tactical. Many marketers today specialize in digital marketing and social media, while others only have experience with traditional methods and campaigns. As we shared earlier, without a marketing background and experience, owners and senior leaders are often shooting in the dark when making a hiring decision.

Firms short on marketing knowledge may want to consider partnering with an experienced marketing consultant to help them select their new marketing leader. If you're not a marketing pro but need to hire a marketing professional, here are some key ideas to guide you.

### **Carefully Define the Position**

The first and most important step in hiring a marketing professional is for business owners to determine the ideal experience level and skills needed to advance their companies. They also need to develop a comprehensive list of functions to be performed and whether these duties are recurring, periodic, or one-time. A very common recruiting mistake that non-marketing leaders make is assuming that one person is willing and able to do everything needed by the business.

For example, in American football, the skills and duties performed by a punter are quite different than a linebacker. One cringes to think what would happen to a punter playing in a linebacker position – it's likely that his career would be short-lived, and that is exactly what happens to marketers as well.

If your company has never embraced marketing and is seeking leadership and planning, it needs the skills of an experienced, strategic marketer – at least initially. Perhaps the business owner can hire a marketing consultant to develop the playbook and then obtain a full-time, mid-level, tactical professional to run the plays and measure the results. There are many ways to structure the marketing function, but a having a one-size-fits-all mentality is probably going to fail.

### **Determine Eligibility**

Any marketer applying for a mid-level to senior position should be able to share a wide range of their work, including original copy, press releases, strategic plans, campaigns (from inception to completion), websites and more. But more important, they should be able to discuss how their work made a difference – where did it fit into the overall, integrated marketing plan, and what were the measurable outcomes?

A word of caution: most marketers are exceptional project managers; not all project managers are great marketers. You'll want to ensure that the professional you hire has knowledge of basic marketing concepts like positioning, segmentation, and differentiation. This knowledge gives them the framework to perform their duties at a higher level now and in the future.

# Outsourced Marketing Firm Purchase Decision Considerations

If your firm has chosen an outsourced or hybrid marketing model, there are specific considerations for that outsourced hire as well:

## A) Ask Targeted Questions

The following ten questions should help in this process:

1. How long have you been in business?
2. What are your areas of specialization?
3. Have you worked with companies in our industry?
4. What would your clients say are your firm's strengths?
5. If others will be working on our account, tell me about their experience and what valuable skills will they bring to our firm?
6. Describe the daily, weekly or monthly communications between our firms to ensure that the marketing program is on track.
7. Describe an example of an integrated marketing program that you led and how did you measure results.
8. What would you expect our role (as your client) to be in the marketing process?
9. Describe an unsuccessful client engagement and what went wrong.
10. In working together, what are the keys to achieving a successful outcome?

## B) Ask for a Detailed Proposal

A proposal for marketing services should reflect the provider's understanding of your B2B company's goals, objectives, challenges and opportunities. You don't want an off-the-shelf approach, as no two firms are alike.

Ask for a detailed scope of what is being provided, including the breakdown of certain processes. For example, if a positioning study is being proposed, you will want to know the general steps involved. That way, your B2B company will have a clearer understanding of the marketing service provider's time investment.

Finally, insist upon a detailed breakdown of fees. If you are presented with one lump figure, red flags should go up. Bios for the specific professionals who will be working on your account should be included to ensure that your team has marketing education and experience, and 3-5 references should be provided from other clients in the same or similar industry.



### **C) Select a Marketing Provider with Experience in Your Industry**

There is no one-size-fits-all solution when it comes to marketing, especially in the digital era. The strategies, tactics and tools that are right for a B2B services company will be quite different than for one that sells products. For example, Inbound Marketing, which involves pulling prospective customers to your firm's website through providing content of value, is a highly effective long-term marketing strategy for professional services providers. This would likely not be the right fit for a commoditized B2B product company.

### **D) Gain Understanding of Fair Pricing**

Typically, marketing vendors hired for one-time consulting or project work will charge higher hourly fees; there is a learning curve involved with getting to know the specifics of your professional service industry, and there is no promise of recurring revenue. Outsourced marketers, however, are typically willing to keep fees lower as they know they will recoup this upfront investment of time over a longer period.

A general estimate for the total marketing budget, including marketing services and other costs such as advertising, for most B2B professional services firms will be approximately 2-6% of top-line revenue. If your firm has never really done proactive marketing and/or is looking to ramp-up marketing aggressively, your investment initially will be at the higher end of this range.



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## About Marketri

Marketri is a modern-method B2B strategic marketing consulting and fractional CMO firm that helps clients obtain and retain customers to reach growth goals. We offer a range of services that cater to B2B middle-market and fast-growing startup businesses more effectively than traditional models.

Marketri leads clients' strategic marketing efforts through start-to-finish, integrated marketing solutions that support long-term relevance and success. We develop cost-effective, scalable marketing strategies and measurable programs that consistently drive qualified leads and lower the cost of new customer acquisition. Our model, our network, and our experience provide our clients unsurpassed value for the marketing dollar.

