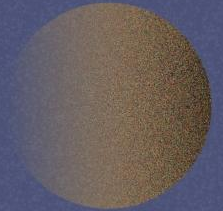# Operations Playbook

EXPERT
MARKETING
ADVISORS

Operations Typical Tasks

- Data Entry - List imports, webinar attendees, data scrubbing, etc.
- Data Management - cleaning up and/or validating existing database
- Automation Management - creating new automation, or managing existing automation
- Training - training new users on the platform, best practices
- Reports & Dashboards - creating and maintaining KPI reports, tailored dashboards
- Ongoing Requests

Best Practices

- Initial Operations Review for all new clients
- Weekly Operations meetings
- All lists include same required fields & scrubbed for data quality
- All requests & changes documented in Basecamp
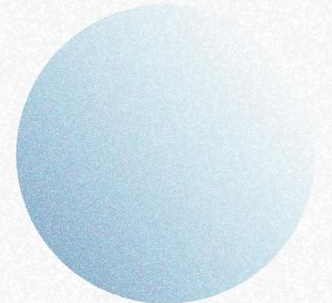
Glossary

Term	Definition
CRM	Customer Relationship Management. Salesforce is most common. Hubspot is a less-expensive CRM, because it has less features than Salesforce.
Salesforce	The most popular CRM on the market. Also the most expensive. Can manage full Sales -> customer lifecycle, serve as data repository, etc
Marketing Apps (Hubspot, Marketo, Pardot)	Manages everything related to a prospects marketing activity. Form fills, automated scoring, email, blogs, landing pages, event invites, campaigns, etc. Focus on inbound marketing.
KPI	Key Performance Indicator: tells you if something is doing "well" or not. A custom benchmark. A KPI might be "bring in 50 leads per month" or "generate $1M pipeline per year".
MQL	Marketing Qualified Lead: this person is "marketing qualified" - they meet the minimum custom criteria to be called "qualified" for further reach out. (Could be a Lead or a Contact in Salesforce)
SQL	Sales Qualified Lead:The specific criteria is unique to each customer Sales has validated the prospect has potential to become a Sale. (Could be a Lead or a Contact in Salesforce)

Glossary

Term	Definition
SAL	Sales Accepted Lead: the team determines an opportunity is worth pursuing and is approved
Qualified	Very early startups may use this term before they begin distinguishing before Sales vs Marketing Qualified - this generally means that their unique qualification criteria has been met
Prospects, Leads, and Contacts	These are all variations on terminology to mean people - random form fill, webinar attendees, current customers, prospects, etc. In the Marketing platform, there is typically only one word for them, Salesforce has two words (Leads and Contacts)
Leads (in Salesforce)	Leads are an "island" in Salesforce. They are random people not connected to anything. They are worked by a pre-sales team (BDR/SDR) or by marketing.
Contacts (in Salesforce)	Contacts are people who have already been qualified, and matched with an Account (Company) in Salesforce

Glossary

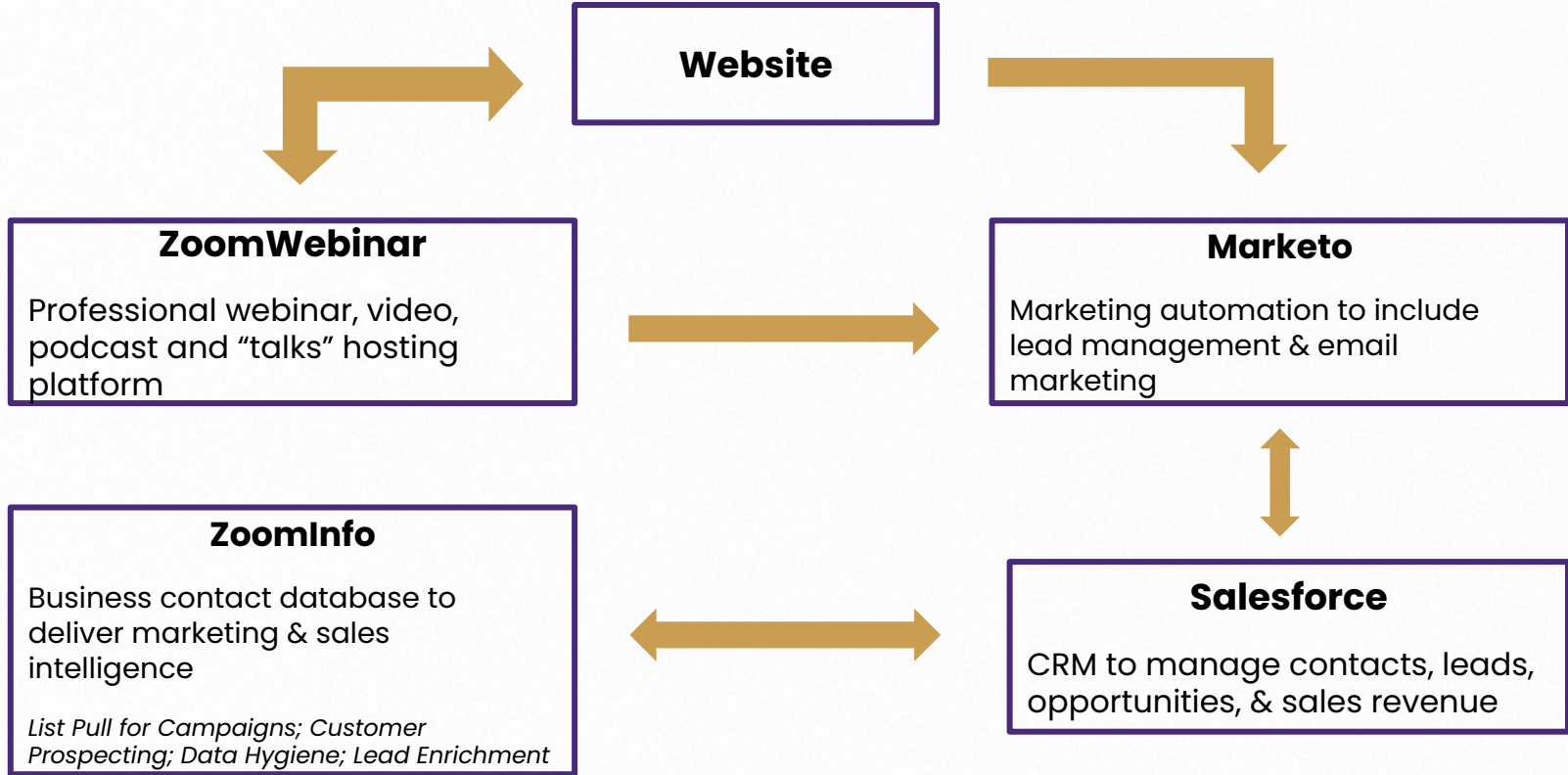| Term	Definition
Lead Score	The Marketing platform assigns points, and a numerical total score to each person (prospect) as a method of indicating their potential level of interest, or likelihood of becoming a pipeline prospect. A higher score = higher likelihood
BDR/SDR/Inside Sales	"Business Development Rep" or "Sales Development Rep" typically do raw prospecting, cold calling, and responding to lists from events. Generally pre-sales, but teams can be either in Marketing department or Sales department
AE	"Account Executive" - aka - Sales Reps - responsible for majority of Sales at a given company. Sometimes have titles like "VP of (region)"
Campaign	In Salesforce, a Campaign is a record of a unique instance of a certain event/activity. For example, Dreamforce 2022 is a unique event. There can be many Campaigns, one for each year, or campaigns for the same event in different regions. Could be created for any reason - for example, a monthly newsletter blast might have a campaign called "November 2022 Newsletter Send"
Campaign Member	Campaign Members are people who participate in a given campaign - could be people who were sent a newsletter, people who were invited to an event, people who stopped by a booth, etc.

Glossary

Term	Definition
Lead Nurturing	When a prospect is not ready to make a purchasing decision, that prospect is "nurtured." Nurturing a prospect (Lead) involves keeping them in the pool of potential future customers, and sending them periodic marketing information, such as newsletters, and invitations to sales/marketing events.
ABM (Account Based Marketing)	This is a Sales/Marketing technique where rather than letting the leads come in naturally, a company will proactively target particular Accounts/businesses. Companies in the Fortune 500 list are typical targets for ABM. A Sales person will say, "I'm going to go after these specific companies." and download lists of targeted employees from those specific companies for prospecting.
Customer Acquisition Cost (CAC)	How much it costs to acquire a new customer. A very general formula is: # of Customers / Marketing Spend on those Customers = Customer Acquisition Cost 25 customers / $100 Marketing Spent = $0.25 Customer Acquisition Cost
Cost Per Lead (CPL)	The amount marketing spent, divided by the number of leads that were generated. $500 Marketing Spent / 3,000 Leads Generated = $0.16 Cost Per Lead

Apps that Operations Frequently Manages

- Salesforce
- Hubspot
- Marketo
- LeanData
- ZoomInfo
- Outreach.io
- SalesLoft
- 6Sense
- Chorus
- Zoom

- Chili Piper
- Calendly
- Gong
- DocuSign
- Sprout
- Slack
- Jira
- Zapier (other apps)

Tech Stack Flow

Website

ZoomWebinar

Professional webinar, video, podcast and "talks" hosting platform

Marketo

Marketing automation to include lead management & email marketing

ZoomInfo

Business contact database to deliver marketing & sales intelligence

List Pull for Campaigns; Customer Prospecting; Data Hygiene; Lead Enrichment

Salesforce

CRM to manage contacts, leads, opportunities, & sales revenue

Tools Comparison

HubSpot	Marketo	salesforce pardot
3rd party application from Salesforce	3rd party application from Salesforce	Native to Salesforce
Lower/Medium Price	Most Expensive	Priced with Salesforce
Can be used as a CRM as well	Marketing Only	Marketing Only - With Salesforce Only
Very easy to work with, but not quite as powerful as Marketo	Difficult to work with/learn, but more powerful than Hubspot	Most difficult to work with - least amount of customization
Uses one word to refer to a person (Lead, or Contact, or Prospect)		
Full Marketing Automation Platform - send nurture emails, event invitations, newsletters, product announcements		
Manage Scoring for prospects		

Leads vs Contacts

Leads

Name: Carol Smith
Company: unknown
Email: caroltest@gmail.com

Name: Aaditya Rao
Company: Optiv
Email: aadi@optivtest.com

Name: Unknown
Company: Unknown
Email: none@none.com

Name: James Arthur
Company: Microsoft
Email: jarth@microsoft.com

Name: Sam G
Company: Student
Email: sam@samg.com

Contacts

Optiv

Sony

Name: Mike Rogers
Company: Optiv
Email: miker@optiv.com

Name: Susan Wilson
Company: Sony
Email: susanw@sony.com

Name: Bill Oscar
Company: Optiv
Email: billo@optiv.com

Name: Amy Davis
Company: Sony
Email: amyd@sony.com

Name: Gordon Sweet
Company: Optiv
Email: gordons@optiv.com

The Funnel

B2B Account Marketing & Sales Pipe

zoominfo
Powered by DiscoverOrg

zoom

BrightTALK

Marketo

HubSpot

Microsoft Dynamics 365

salesforce

NEW LEADS
**TechStack TBD based off budget and needs

WORKING CONTACTS
**Conversions TBD based off Goals and ASP

OPPORTUNITIES
**Stages TBD based off Business Model

Funnel Stage
NEW LEADS
NURTURING
MQL
WORKING/SAL
SALES QUALIFIED/SQL
10% - OPPT IDENTIFIED
30% - POC/DEMO
50% PROPOSAL/QUOTE
70% - NEGOTIATION
100% - CLOSED WON

nurture
accept   disqualify

Awareness
Intent
Evaluation
Purchase
Advocacy

Marketing
Inside Sales
AE/Field Sales

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Operations provides the structure for the funnel. We manage the apps, make sure data flows between apps, and provide metrics, KPI's, conversion rates.

Summary

- **Common Terms**

- **Role of Operations**
  - Data
  - Analytics
  - Configuration
  - Execution

Goal: Increase sales through a CRM
1. 9:1 ROI
2. ~ 29% increase

Benefits
- Organize contacts
- Segment customers
- Forecast sales
- Analyze deals
- Scale process

Thank you!

For inquiries or questions, please email
contact@expertmarketingadvisors.com

www.expertmarketingadvisors.com