



## *Optimize Return on Marketing with Marketing Operations*

**Marketing Operations Partners** ([www.mopartners.com](http://www.mopartners.com)) addresses your marketing organization's complexity and ROI. Here is an overview of Marketing Operations Partners and its services and its team. We can customize solutions for your specific needs.

### **Change the Modus Operandi of Marketing**

Marketing Operations Partners works with CMOs and their teams to change the MO of Marketing by leveraging process, technology, guidance and metrics to run Marketing as a profit center and fully accountable business. We help our clients accelerate the sales process, build a scalable Marketing infrastructure, optimize customer profitability, build an ecosystem of stakeholder support for strategic initiatives and demonstrate measurable return on marketing. In short, we help CMOs operate like CEOs.

### **What Makes Us Different**

We provide a ready-to-go, seasoned team of subject matter experts in all areas of Marketing Operations to help solve complex marketing organization challenges and get the most out of resources. Our integrated team approach is ideal for complex marketing organizations navigating turbulent change while often challenged with conflicting demands from a variety of stakeholders, both in and outside marketing.

### **Why Marketing Operations Is Critical to Your Organization**

**Provides the Marketing Chief with an operational partner, similar to the COO/CEO relationship**

- Brings a long overdue operational focus to marketing

**Establishes a discipline to increase efficiency and drive consistent results**

- Applies proven and time-tested processes and best practices to Marketing Operations Partners

**Creates a solid foundation for Marketing excellence**

### **Our Vision for Your Marketing Organization**

**Marketing acts as fully-accountable strategic partner to your CEO, CSO and other C-level executives**

- Contributes to formulating and achieving enterprise strategic initiatives
- Proactively defines meaningful metrics and demonstrates ROI contribution to organization success

**Marketing drives innovation, new market penetration and customer profitability**

- Tight alignment with R&D, sales and customer advocacy
- Builds Customer Franchise Value, Voice of the Customer intelligence and pipeline of references

**Marketing owns sales leads process**

- Nurtures prospects through your sales funnel
- Removes barriers that block end-to-end pipeline visibility

**Marketing, once operationalized, leads the ramp of organizational growth**

- Provides agility and effective response to opportunity
- Leverages best practices, process and technology to scale your marketing organization
- Synchronizes effort and ensures cross-functional knowledge-sharing

## *Marketing Operations Partners Service Offerings*

### **Sales Process Acceleration**

Team Leader: Ron Snyder

#### **Demand Driver™**

Boost your prospect conversion rate with proven lead-generation and lead-maturation services and solutions.

#### **Customer Reference Power™**

Generate a deep, renewable supply of customer advocates for sales, public relations and marketing opportunities.

#### **Bridging the Marketing and Sales Gap**

Get marketing and sales on the same page through this interactive workshop.

#### **Synergizing for Results™**

Align goals, roles and metrics across multiple functions.

### **Marketing Scalability**

Team Leader: Jerry Hart

#### **Marketing Optimization Review**

Diagnose your marketing organization to determine investment leverage areas, uncover inefficiencies and define a prescriptive change roadmap.

#### **Infrastructure Accelerator™**

Implement a prototype marketing operations initiative that lays the groundwork for achieving continuous outstanding performance by your entire marketing organization.

#### **Managing Change for Results™**

Motivate and support your people through the change process.

#### **Performance Leadership**

Deploy process, technology and best practices to increase marketing efficiency, facilitate knowledge sharing and optimize resource management.

#### **Campaign Management**

Learn to develop and execute team-based world-class integrated marketing campaigns.

### **Customer Profitability**

Team Leader: Lynn Hunsaker

#### **Customer Value Guidance**

Use customer franchise value analysis as a guideline for customer listening strategies, executives' strategic decisions, and front-line employees' tactical decisions.

#### **Total Customer Analysis**

Discover patterns to enable proactive management of customer relationships.

#### **Customer Advisory Boards**

Understand the business issues driving your customer's decision process through professional customer advisory boards that augment and enhance your strategic plan.

#### **Customer-Focused Value Chain**

Engage all parts of your organization in systematically improving *their* specific impact on the customer experience.

#### **Customer Touch-Point Alignment**

Ensure consistency and optimization across all customer interfaces.

#### **Total Experience Innovation**

Innovate and optimize per the customers' entire experience with your brand.

#### **Loyalty Behavior Programs**

Encourage customer behaviors in support of your retention objectives. Examples include volume rewards, contests, appreciation events, customer relationship management (CRM), communities of interest, tailored services, and other programs.

#### **Expedite Follow-Through on Customer Commitments Amidst Change**

For program managers who must influence others without direct authority, develop Interaction Bridges™ skills to adapt communication for intended interpretation and cooperation, especially during turbulent change.

*\*Interaction Bridges is a trademark of ClearAction.*

# *Marketing Operations Partners Service Offerings*

## **Strategy and Change Facilitation**

Team Leader: Mike Gospe

### **Constructing Your Fiscal Corporate Marketing Plan**

Leverage expert marketing facilitators to architect a customized planning process for your marketing team that is pragmatic, practical and world-class.

### **Visioning for Results™**

Establish shared vision and prioritize strategic initiatives to close the gaps between current reality and the vision through this comprehensive process.

### **Linking Positioning With Strategy**

Designed for business unit and product teams, leverage customized positioning and messaging workshops to guide you in the development of a structured positioning statement and elevator pitch.

### **Socializing Marketing Operations in Your Organization**

Win critical support for deploying Marketing Operations in your organization through a two-hour Marketing Operations overview or half-day interactive workshop.

### **Mindshare Compassing™**

Establish an operational roadmap to build lasting mindshare through this research and facilitation process.

### **Marketing Competency Development**

Assess and build core marketing competencies and organizational capabilities for building best-in-class teams that can address future marketing challenges.

### **General Facilitation Services**

Ensure meeting success by leveraging professional facilitation that frees you to engage to the fullest with the rest of your team.

## **Return on Marketing**

Team Leader: Linda Popky

### **Marketing ROI Assessment**

Assess your organization's current capabilities, including data capture and analysis, and develop a strategy for implementing a return on marketing program.

### **Metrics Map™**

Transform your complex web of financial, operational, performance and program metrics into a strategy that addresses the information needs of each of your key stakeholders.

### **Marketing ROI Measurement**

Assess and objectively substantiate the value of marketing campaigns, programs and initiatives to better measure and manage marketing investments.

### **Predictive Dashboards**

Develop a balanced scorecard with both lagging and leading performance indicators to inform decision-making, motivate employees and predict customer perceptions.

### **Team Recognition System**

Enable teams to self-report their achievements in a customizable software application for objective selection of award winners.

### **Industry Research ROI**

Get optimal value from your industry research and analyst consulting relationships.

*\* Synergizing for Results, Managing Change for Results and Visioning for Results are trademarks of Breakthrough, Inc.*

*\* Demand Driver, Customer Reference Power, Infrastructure Accelerator, Mindshare Compassing and Metrics Map are trademarks of Marketing Operations Partners.*

## *The Team Behind Marketing Operations Partners*

**Gary Katz** is *President, CEO, and founder of Marketing Operations Partners.*

- Founder of CommPros Group, an outsourced marketing program management firm; Katz Business Communications, and Public Relations Solutions, Inc.
- Clients include Cadence, E-Tech, Finisar, Hewlett-Packard, Interlink, Lineo, MIPS, Philips, Racal-Vadic, Siemens, Sun, Tektronix and many start-ups
- 20 years at ShoreTel, Aplix, Insignia Solutions, and PR/marketing consulting firms
- Expertise: corporate marketing, communications, public relations, lead generation & qualification, investor relations, employee communications, change management, organizational learning, process facilitation, marketing ROI
- Track chair, 2005, 2006 and 2007 Marketing Operations Management Symposium
- Published articles: MarketingProfs, Automate, Journal of Digital Asset Management
- Founded Marketing Operations Evangelists online community
- Certified Strategic Planning Process Facilitator, Accredited Member of PRSA, and past president of Silicon Valley Public Relations Society of America (PRSA)
- Masters - Human Resources & Organization Development, University of San Francisco;  
BA - Public Relations, San Jose State University

**Sharyn Fitzpatrick** is associate partner and directs Marketing Operations Partner's *Marketing Process Design services, which are part of the Marketing Scalability service led by Jerry Hart.*

- Founder of Marcom Gurus, a strategic marketing communications firm
- Clients include American Society for Training and Development, eLearning Forum, SuccessFactors, Rapt Inc, Interwise, Summit ID, Vitesse Learning
- 20+ years experience in sales and marketing with Docent, Dialog Corporation, Knight-Ridder Information, The Learning Company, Accolade, Pacific Bell, Atari, Warner Communications
- Expertise: global marketing communications, process and systems design, web design, brand and corporate identity, creative services, investor relations, public relations, promotion, advertising, direct mail, trade shows, sales merchandising
- Won numerous awards for public relations, marketing campaigns, brand and corporate identity, and product launches, including Ad Week's Product Rollout of the Year in 1994
- Past president of Penn State College of Communications Alumni Board's Advertising & PR Alumni Network, board member of College of Communications Alumni Board, and a member of the board of directors for the Penn State University Alumni Silicon Valley Chapter
- BA - Journalism from Penn State University

**Mike Gospe** is associate partner and team lead of Marketing Operations Partners' *Strategy and Change Facilitation services for aligning marketing organizations with the enterprise strategic planning process and independent facilitation of marketing strategic planning processes.* He also directs its *Campaign Management services to develop and execute team-based world-class integrated marketing campaigns.*

- Founder of KickStart Alliance, a positioning and sales development consulting firm
- Clients include ADP, Aspect, BEA, Citrix, Hyperion, Phoenix, Symantec, VeriSign,
- 20 years at HP, Sun, Ariba, and Verisign
- Expertise: marketing process and plan design, market- and product-requirements gathering, demand generation campaigns, product management and product marketing issues resolution, customer advisory board facilitation
- Author of "Positioning for Profit: Prospecting for the Marketing Mother Lode"
- Acclaimed workshop: "Building a Better Mousetrap: A Positioning Workshop"
- MBA & BSEE - University of Santa Clara

## *The Team Behind Marketing Operations Partners*

**Jerry Hart** is associate partner and team lead of Marketing Operations Partners' *Marketing Scalability services to develop sustainable marketing processes, effectively leverage technology solutions and get the most out of individuals and teams*. He also directs its *Internet Operations services to deliver profitable e-mail marketing and search engine marketing programs, and to produce dynamic database-driven websites*.

- Founder and CEO of Hart Creative Marketing, an internet marketing consulting firm
- Clients include CARS Magazine, Chevron, CSG Better Hearing, Houseboats.com, McAfee, Partner Freedom Financial Network, PartySync, Sun
- Former San Francisco morning show radio host for Clear Channel Communications
- Expertise: campaign management with advanced analytics for direct marketing, personalized email, targeted websites, banner online advertising, search engines, print-based direct mail, Web 2.0
- Guest host of OfficeDepot.com Web Café worldwide marketing series broadcast
- Author of *Blueprint to E-Marketing*, published by Blueprint Press, September 2006

**Dick Heermance** is founding partner and directs Marketing Operations Partners' *Customer Reference Power services to optimize marketing organizations' reference programs by building a pipeline of passionate customer evangelists*.

- Founding partner of CommPros Group
- Clients include Aplix, Blazent, Neptium, ShoreTel, YLA and others
- 30 years at Insignia Solutions, Software Publishing, Informix, Tymshare, Oracle
- Expertise: re-branding/re-positioning strategies, worldwide PR, product launch, advertising, packaging, trade shows, direct marketing, partner programs, sales, professional services, customer relations

**Lynn Hunsaker** is associate partner and team lead of Marketing Operations Partners' *Customer Profitability services for guiding marketing organizations in engaging all groups throughout a company in acting on customer feedback for sustainable results*.

- Founder of ClearAction, a customer retention consulting firm
- Clients include Accountants Inc, Adia, Applied Materials, Bancroft Whitney, Belmont Hills Hospital, Cadence, FormFactor, Hospira, Inmac
- 20 years at Applied Materials, Business Insights, Tragon, and Sonoco
- Expertise: customer satisfaction improvement, metrics, quality tools, recognition and executive incentive programs, process improvement, change management, product management, alliances, market research
- Professional Certified Marketer, Certified Quality Manager, Qualified MBTI® Practitioner
- Past president of Silicon Valley American Marketing Association
- Instructor at UC Berkeley Extension, SJSU, and Mission College
- MBA - Vanderbilt University; AAS - Psychology and BS - Marketing, BYU

**Dr. Juan P. Montermoso** is associate partner and team lead of Marketing Operations Partners' *Marketing Information Technology services to make effective use of IT resources in advancing marketing and supply chain operations*.

- Founder of Montermoso Associates, a marketing and training consulting firm
- Clients include Applied Materials, Hewlett-Packard, Intel, Palm, Visa, Yahoo
- 27 years at Hewlett-Packard and an Asia Pacific conglomerate and SGV Group
- Expertise: marketing information systems, operations, business development, international channel programs, e-business, strategy & planning frameworks & practices, trainer, educator
- Instructor at St. Mary's College, University of San Francisco, Ateneo deManila Business School - Philippines
- Homecoming Scientist Award, Philippine government; Certified Production and Inventory Management and Certified Integrated Resource Management
- PhD - Business Administration: Computer-Based Systems, Harvard Business School;  
MS - Computer Science & Applied Mathematics, Harvard University;  
BS - Engineering & Applied Science, Yale University

## *The Team Behind Marketing Operations Partners*

**Tom Pencek** is founding partner and directs Marketing Operations Partners' *Demand Driver services to build lead-generation and lead-nurturing programs that provide superior return on investment for marketing organizations.*

- Founder of TL Pencek & Associates a services marketing firm
- Founding partner of CommPros Group
- Clients include Alliance Manufacturing, City of Palo Alto, Franklin Covey, Knickerbocker Toy Company, Pacific Insurance Services, Rich's Business Guides
- 20 years at HP, Compaq, Tandem, SGI, Elan Computer Group (UNIX)
- Expertise: sales, sales management, service development and marketing, services marketing, lead generation program management and measurement
- Service Marketing Professional Certification by Information Technology Services Marketing Association (IT SMA)
- MS - Scientific Communication, Boston University; BS - Biology & English, Marietta College

**Chris Pareja** is associate partner and, together with Ron Snyder, directs Marketing Operations Partners' *Sales and Marketing Alignment services to help sales and marketing teams work well together.*

- Founder of LeadGenaires, a marketing campaign consulting firm, and B2B Power Exchange, a lead exchange forum for business development professionals
- Clients include Intel, Ariba, AccPac, Technology Ventures Corporation,
- 12 years at Kassner, Flowtix SBS, NAME Solutions, Cambridge Technology
- Expertise: sales/marketing alignment, field marketing, sales, business development, lead generation

**Linda Popky** is associate partner and team lead of Marketing Operations Partners' *Return on Marketing services to demonstrate the contribution of marketing organizations to enterprise success.* She also directs its *Marketing Competency Development services to build marketing organizations' core competencies for navigating turbulent change and capitalizing on emerging opportunities.*

- Founder of L2M Associates, a consulting firm leveraging marketing programs, processes and people
- Clients include Aires Solutions, Autodesk, Cisco, CompeteNet, Confab 2004, NetManage, Sonatina
- 20 years at Sun Microsystems, iPlanet-Netscape, Cognition, Adage
- Expertise: marketing operations, channel and field marketing, marketing communications, marketing team development, facilitation, industry and market development, product marketing, customer loyalty, marketing ROI
- Charter member of Conference Board Council on Customer Strategy; liaison between Women in Consulting (WIC) and Society for the Advancement of Consulting (SAC); mentor for Women's Technology Cluster business incubator
- MBA & BS - Communications, Boston University

**Murry Shohat** is founding partner and directs Marketing Operations Partners' *Public Relations Operations services to build and sustain mindshare by ensuring external communications efforts are well-aligned with the company's actual performance.*

- Founder of Shohat & Kahn Media Relations, founding partner of CommPros Group
- Clients include Agilent, Ampro, Cirrus Logic, Force Computers, LynuxWorks, Parker Automation, Real-Time Consortium, Red Prime, Synopsys, VLSI Technology, YLA
- 20 years at Agilent, Philips Electronics, Signetics; magazine editor and reporter
- Co-founder of Embedded Linux Consortium
- Expertise: public relations and marketing communications strategic planning and execution, corporate communications, analyst relations, investor relations, media training, positioning, writing and messaging, market research
- MBA - Cybernetics & BA - Journalism, San Jose State University

## *The Team Behind Marketing Operations Partners*

**Ron Snyder** is associate partner and team lead of Marketing Operations Partners' *Sales Acceleration services to substantially improve the efficiency of the sales and marketing effort and return on time and dollars invested.*

- Founder of Breakthrough, Inc., a consulting firm for alignment of sales, marketing and product development
- Clients include Adobe, Agilent, Cisco, Exodus, Genesys, Guidant, Hewlett-Packard, Macromedia, Mentor Graphics, NetSuite, Philips, Siemens, Sun, Synopsis
- 11 years at HP in software, systems solutions and medical systems
- Expertise: worldwide cross-functional marketing program management, performance management, bringing new products to market, entering new markets and leading sales teams, product design, engineering project management
- MBA - Northeastern University;  
BS & MS - Engineering Design & Human Factors in Design, Tufts University

**Mike Teeling** is associate partner and directs Marketing Operations Partners' *Analyst Operations services to optimize marketing organizations' research and consulting investments.*

- Founder of Influential, a marketing communications consulting firm
- Clients include 3M, Actuate, Broadvision, Cambridge Technology Partners, EDS, Oracle, PeopleSoft, SGI, The Chasm Group, Tumbleweed, US Web/CKS Wells Fargo
- 17 years at Active Decisions, The Horn Group, Fleishman-Hillard, IDB Communications/Worldcom, Family Channel, NBC, Warner Brothers Television
- Expertise: industry analyst contract ROI, B2B technology brand creation, marcom and PR strategic planning, brand audit and re-branding, industry analyst relations, writing and messaging, and executive presentation coaching
- Blogger, [Buyer2Brand](#)
- BA - Mass Communications, Boston College

## *Marketing Operations Partners Article Collection*

<http://www.mopartners.com/resources/index.php> - mopartners

### **Mike Gospe:**

- "The Truth About Campaign Management"
- "Expect More Out of Meetings: Professional Facilitators Can Keep Your Meetings Focused and Productive"
- "Do You Have A Clear Picture of Your Marketing Team's Performance"
- "How To Gain Strategic Insights Through Customer Advisory Boards"

### **Jerry Hart:**

- "Leveraging Predictive Analytics in Marketing Campaigns"
- "Measuring Again and Again"
- "More Accountable to the Bottom Line"
- "Wacky Web Metrics"

### **Lynn Hunsaker:**

- "Squeeze the Lemons for Loyalty Growth"
- "Interaction Bridges: The Best Strategic Tool for Keeping Customer Promises"
- Blog: Customer Experience Optimization  
<http://clearaction.biz/blog>

### **Gary Katz:**

- "Marketing Operations: A Three-Phase Self-Assessment to Determine If Your Marketing Organization is Ready to Change Its M.O. Now"
- "Marketing Operations: 10 Signs That Your Marketing Organization Is Ready to Change Its M.O. Now"
- "Marketing Operations: Solving Marketing's Seven Deadly Sins"
- "Integrating Organizational Effectiveness, Learning, and Change Management Insight into Public Relations and Communication Management"

### **Chris Pareja:**

- "Seven Ways to Know If Your Sales and Marketing Objectives Need Alignment"

### **Linda Popky:**

- "Marketing Strategy is the Foundation of Success"
- "Face the Customers or Face the Music"

### **Ron Snyder:**

- "Aligning Sales, Marketing and Product Development Efforts for Dramatically Improved Results"
- "Accelerating Sales by Making Buying Easier"
- "Making Changes that Dramatically Improve Results"

### **Michael Teeling:**

- "Lessons for Building a Successful Customer Reference Program"

For more information:

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