



Case Study: A Strategic Phased Approach to GTM Orchestration & Alignment

Driving Global Marketing Precision and Efficiency for a Digital Forensics SaaS Leader

Introduction

For fast-scaling SaaS enterprises, seamless global marketing alignment is critical to supporting growth and operational excellence. Our client, a leader in digital forensic solutions, was facing challenges typical in global organizations: inconsistent workflows, undefined ownership, and inefficiencies across regions.

These issues hindered their ability to deliver timely, cohesive marketing initiatives at scale. They needed a well-orchestrated approach to unify their marketing operations, enabling predictable growth, stronger regional alignment, and a scalable structure.

This case study highlights how our targeted strategy transformed their marketing team into a streamlined, agile, and high-impact unit, capable of effectively navigating the complexities of a globally dispersed marketing team while driving consistent results across all regions. Through a comprehensive audit and a focus on operational excellence, we have set the foundation for their ongoing success.



Operational Complexity in Global Marketing

Our client's highly distributed marketing structure posed a number of critical challenges that restricted their potential for agile and predictable growth:

- **Fragmented Workflows Across Regions:** Operating across multiple regions, the client's marketing processes were inconsistent and often disconnected, leading to execution delays and complicating cross-regional alignment.
- **Ambiguity in Roles and Responsibilities:** Without clearly defined roles, marketing initiatives often encountered bottlenecks, with ownership unclear for key tasks. This created inefficiencies and slowed down campaign rollouts.
- **Prioritization of High-Impact Work:** The client's teams were constantly at capacity, struggling to prioritize initiatives that could deliver the most impact. This hindered their ability to focus on quality over quantity in their marketing efforts.
- **Scalability and Predictability in Marketing Operations:** As the client's global presence grew, they needed a marketing operation that could scale effectively and consistently support their expansion without sacrificing efficiency or predictability.

These issues underscored the need for a structured, collaborative, and reliable framework that could support their continued global growth and enable their teams to deliver impactful results.



Operational Alignment and Process Standardization

To address the client's complex needs and achieve sustainable improvements, we deployed a targeted, phased approach focused on diagnostic insights, operational alignment, and process standardization.

Phase 1: Diagnostics and Operationalization Planning

- **Stakeholder Engagement and Pain Point Analysis:** We worked closely with key stakeholders across regions to uncover workflow pain points and inefficiencies through in-depth individual and team interviews, along with a process audit. This diagnostic phase gave us valuable insights into their perspective, helping us capture the specific operational challenges impacting each team's workflow and overall global marketing effectiveness.
- **Crafting a Tailored Operationalization Plan:** We developed an operational plan centered on the client's goals for regional alignment, scalability, and streamlined workflows. This plan provided both immediate solutions for ongoing projects and long-term strategies for growth and operational alignment.



Operational Alignment and Process Standardization (cont.)

Phase 2: Process Optimization and Adoption

- **Defining Roles and Accountability with a RACI Matrix:** To address role ambiguity and ensure accountability, we introduced a RACI matrix, outlining roles and responsibilities for each marketing initiative across teams. This provided structure, clarity, and ownership.
- **Streamlining Workflows with Standardized Templates and Processes:** We designed comprehensive, end-to-end workflows and campaign templates from planning to execution and optimization, allowing teams to operate more efficiently and maintain consistency across regions. Prioritization tools and processes were introduced to support high-impact decision-making, separating ad hoc workflows to initiatives that will ultimately contribute to the client's business goals.
- **Implementing Monday.com for Enhanced Project Management:** Recognizing that Monday.com was underutilized, we introduced new ways to maximize its effectiveness. We created function-specific project templates to streamline onboarding and establish consistent workflows. Additionally, we set up automation rules to link tasks and set reminders, providing crucial guardrails for project governance. To support cohesive collaboration, we also structured SharePoint as a central repository, ensuring teams could easily access shared information across regions.

Our approach provided the client with an operational structure designed for global adoption, coordination, process efficiency, and scalability, enabling them to navigate their complex marketing landscape with ease.



Scalable Efficiency and Cross-Regional Agility

Our engagement fundamentally strengthened the client's marketing structure, establishing scalable processes and efficient workflows that are now fully equipped to support and drive their global expansion goals:

- **Enhanced Collaboration Across Regions:** With clearly defined processes and improved communication channels, teams across regions were aligned, resulting in streamlined collaboration and smoother project execution.
- **Increased Efficiency and Defined Ownership:** The new RACI matrix and standardized workflows removed bottlenecks, clarified ownership, and accelerated the execution of marketing initiatives. This led to faster project completion and minimized delays.
- **A Scalable, Predictable Framework for Growth:** Through a structured operational framework, the client's marketing team became more agile and equipped to scale in alignment with the company's global growth trajectory.

This strategic marketing orchestration initiative has truly revitalized our client's marketing function, turning it into a cohesive, agile, and scalable team ready to embrace future growth.

With a solid operational framework now in place, the client is well-equipped to accelerate their expansion efforts, ensuring that every marketing initiative is executed efficiently and makes a meaningful impact. This transformation not only boosts their marketing capabilities but also reinforces their position as an industry leader in digital forensics.



Our marketing orchestration efforts have refined the client’s marketing function, leading to clearer roles, better communication, and more efficient project execution. As a result, the team is now more aligned and responsive, positioning them to capitalize on growth opportunities and enhance their standing in the industry.



| Marketing Orchestration Scorecard | | | | | |
|-----------------------------------|--|---|---|---|--|
| | Initial | Ad-hoc | Defined | Managed | Optim |
| Collaboration & Communication | No established regular communication channels or meetings | Team meetings are scheduled, but lack of comprehensive reporting to other impacted teams | Clear team ownership and accountability, but lacking clearly defined roles and objectives and lack of visibility on meeting goals/efficiency | Teams meet regularly with clear agendas and objectives, but communication occurs during these meetings | In addition to meeting, established communication channels and meetings to be utilized as needed |
| Rules & Process | No standard process or other structure, individual teams have their own ways of working | Process is defined, not fully adopted and frequent workarounds | Process and rules defined and agreed upon as they relate across functions | Process is repeatable, all teams own and in use, adaptable as necessary, met, quality of life and work at top | Teams are applying the process and objectives |
| Project Management Tools | No project templates, projects are scoped out separately and done with no consistent structure. Steps are not consistent | Teams use different tools, no integration across teams, lack of visibility resources/capacity | One project management tool in use that fits most requirements, used across all teams, resources are aligned with priorities | One project management tool is consistently used across all teams, resources are aligned with priorities | Consistent reporting/tracking process across all teams, resources are aligned with priorities |
| Strategic Alignment & Planning | Planning done opportunistically rather than a strategic perspective on programs and initiatives, objectives not aligned across teams | Different planning process across teams, not repeatable/documentable, using different/consistent inputs, get distracted by new ideas/tech/tools | Agreed upon planning process across teams that is repeatable/documentable, used consistently, internal/external inputs are aligned in the process, as part of strategic development | Planning process is consistent and adopted across teams, includes room to adjust to market conditions | Strategic planning/adjustment process, includes changes and optimization |

Wondering how you measure up on Marketing Orchestration?

Discover key areas for improvement with our comprehensive scorecard

[REQUEST THE SCORECARD](#)

With our expertise in developing scalable marketing solutions, we’re ready to help organizations streamline operations, boost collaboration, and set the stage for future success. Start by assessing your current marketing effectiveness with our Marketing Orchestration Scorecard.

If you’d like to discuss your score or learn more about how we can assist you in enhancing your marketing efforts, [let’s connect!](#)

ABOUT HEINZ MARKETING

Focused on helping clients drive predictable growth via a revenue responsible focus, Heinz Marketing helps B2B marketing teams elevate their impact and contribution to business outcomes that matter. Our proven **Predictable Pipeline** methodology has been successfully customized and implemented at countless organizations, changing the trajectory of marketing work, careers and lives. The Heinz Marketing team is made up of full-funnel experts who speak the language of sales, empowering clients with strategy and tools for success.

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