RESEARCH REPORT

Eliminating Complexity for a Frictionless Marketing Experience
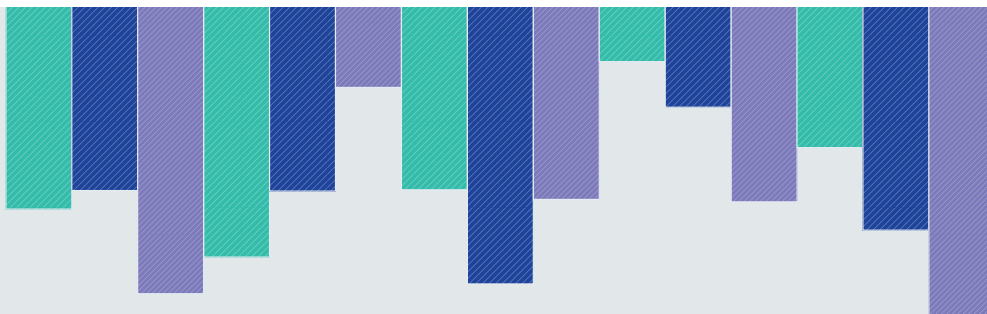
Let's Hear It for Smart Marketing

For marketers, it's easy to look at today's business and political climate and see nothing but worries. Disruptive technologies, sweeping generational shifts, endless policy debates, and international tensions all combine to suggest a world in a state of constant disruption. "Struggling for oxygen" is how one marketer described it in an interview with Harvard Business Review Analytic Services for this report.

Yet the next few years also have the potential to become something else— what I like to call the Era of the Smart Marketer.

Against all the uncertainties, marketers are increasingly asking...*what really matters?* That much is evident in the contours of this report. Marketers are recognizing that today's marketing ecosystem can be "muddled, disjointed, and overcomplicated," as Harvard Business Review Analytic Services puts it, creating mounting strategic and operational challenges. And acknowledging the issues sets the stage for addressing them: the survey shows that two of every five marketers describe their collection of marketing processes as "not very streamlined." No wonder, then, that only 30% of respondents in the survey rate their organization's marketing as "very effective" and more than half say their teams are overwhelmed by the number of channels they have to manage.

In response, Smart Marketers are strengthening their resilience to ride the ups and downs and make the most of the opportunities (aka disruptions) that keep coming our way. These range from leveraging artificial intelligence and data-driven personalization to overcoming the bewildering channel fragmentation highlighted in this report.

To build that resilience, as this report shows, marketers are focusing on a range of strategic imperatives. About half of the survey respondents (48%) say they are working to develop new in-house marketing capabilities and talent, and over half (59%) are increasing use of data to make marketing decisions. Roughly two in five say they are updating their tools and solutions (44%), updating KPIs for measuring success (46%), and developing greater visibility into performance across channels (also 44%).

And here's the good news: This report shows that improved efficiency and streamlined processes get results and lead to happier marketing teams. More than half (54%) draw a direct line between their streamlined marketing process and the ability to respond to the market with greater speed and agility. Other benefits include better customer engagement, better utilization of data and, most important of all, greater campaign impact.

With proof points like these, today's Smart Marketers are pointed toward a better way. Using chutzpah to strengthen our brand voices and take a stand against inefficiency will lead us to a better future for our craft.

Josh Golden
Chief Marketing Officer
Quad

Eliminating Complexity for a Frictionless Marketing Experience

Modern marketing is more than an amalgam of media channels and digital technologies. When executed properly, marketing has the power to provoke meaningful thought, shape megatrends, move global markets, and significantly influence public perception. From a corporate perspective, marketing is no less powerful—an engine that fuels revenue growth and profitability by attracting consumers and securing lifelong loyalty to a brand.

In fact, a November 2023 survey conducted by Harvard Business Review Analytic Services of 527 executives who are involved in marketing decisions shows that 89% say it's more important than ever that marketing play a strategic role within organizations. Yet only 30% of respondents rate their organization's marketing as "very effective" today, signaling a missed opportunity to glean sustainable business value from marketing initiatives.

A number of key factors are negatively impacting marketing operations today. These variables include macroeconomic trends, cited by 73% of respondents as having a significant or moderate negative impact, followed by increased operational costs (66%) and shifting consumer behaviors (65%). But while no business function is immune to elevated interest rates and economic uncertainty, marketers are faced with a unique challenge: how to manage an explosion of marketing technologies and ever-widening network of partners, from content marketing agencies to influencers.

Together, these elements are adding layers of complexity that make it more challenging than ever for marketers to perform. Fully 77% of survey respondents say their organization faces "some" or "a lot of" complexity within its current marketing ecosystem, and 66% say rising complexity in the

HIGHLIGHTS

89% of survey respondents say it's **more important than ever that marketing play a strategic role** within organizations.

77% of respondents say their organization **faces "some" or "a lot of" complexity within its current marketing ecosystem**, and 66% say **rising complexity in the marketplace is making it increasingly difficult** for marketers to deliver business value to the organization.

30% of respondents **rate their organization's marketing as "very effective"** today, signaling a **missed opportunity** to glean sustainable business value from marketing.

Due to rounding, some figures in this report may not add up to 100%.

> "Many marketers are struggling to find the right amount of time and resources to be able to do their jobs well," says Nick Garrett, a global marketing and commerce leader for consultancy Deloitte Digital.

marketplace is making it increasingly difficult for marketers to deliver business value to the organization.

"Many marketers are struggling to find the right amount of time and resources to be able to do their jobs well," says Nick Garrett, a global marketing and commerce leader for consultancy Deloitte Digital in Sydney, Australia.

More than simply an impediment to productivity, today's increasingly complex world of technologies, partners, and processes can have a direct impact on one's marketing experience (MX). MX is the journey of every professional marketer, from campaign manager to chief marketing officer, as they carry out initiatives to build brand awareness, earn consumer trust, and drive revenue for the organization. Yet friction arising from a muddled, disjointed, and overcomplicated ecosystem can significantly impact MX, resulting in low workforce morale, increased costs, operational delays, and a failure to realize the full value of marketing investments and initiatives. No less importantly, overwrought and overthought marketing can easily lead to a poor customer experience (CX), delivering another blow to a company's growth and profitability.

One reason why organizations struggle with poor MX is because of inefficient processes. "They're creating content, but they're not exactly sure how it fits in; they don't feel respected by other functions in the company; and they don't necessarily see marketing's connection to business strategy," says Paul Magill, managing director of Cohesive LLC, a consultancy based in New York City. "All of these factors make for unhappy marketers and for ineffective customer experiences and customer engagement."

Fortunately, there are steps organizations can take to improve the daily experiences of their marketers and, in turn, deliver a positive CX. To better understand these efforts, those respondents surveyed have been divided into three key categories. Thirty percent are "leaders"—respondents who rate their organization's marketing as "very effective." Forty-three percent are "followers"—respondents who rate their organization's marketing as "somewhat effective." And respondents characterized as "laggards" (27%) rate their organization's marketing as "not very effective." **FIGURE 1**
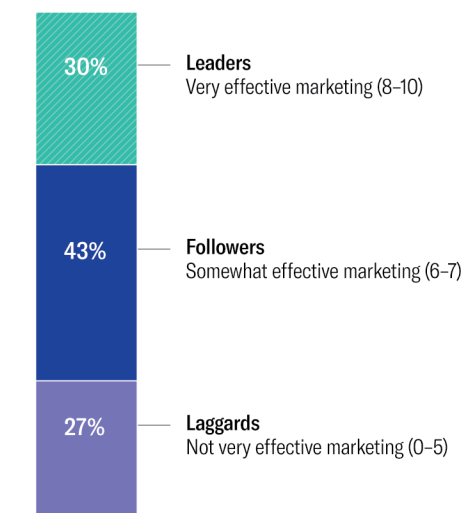
This paper examines the need for organizations to nurture MX, the challenges they face in improving the experience of marketers, and the connection between MX and CX. To help create a roadmap for success, it also dives into the strategies

FIGURE 1

Marketing Maturity Groups

Marketing effectiveness segmented into three categories

Overall, how would you rate your organization's marketing today? [0–10 SCALE, WHERE 0 IS "NOT AT ALL EFFECTIVE" AND 10 IS "EXTREMELY EFFECTIVE"]

30% — Leaders
Very effective marketing (8–10)

43% — Followers
Somewhat effective marketing (6–7)

27% — Laggards
Not very effective marketing (0–5)

Base: 527 respondents

Source: Harvard Business Review Analytic Services survey, November 2023

companies must adopt to ensure a positive MX, such as right-sizing an organization's marketing ecosystem, and to provide marketers with streamlined processes, the right media mix, and data-driven insights.

Facing Complexity

In many ways, marketing hasn't changed over the past few decades. Whether pitching oat milk or the metaverse, the objective remains the same: reach the right target audience, increase brand awareness, endorse products and services, and build a loyal customer base. Yet the channels, technologies, and partners available to achieve this goal have multiplied exponentially, forcing marketers to reexamine everything from annual spend to in-house skills.

Consider, for example, how marketing's channel landscape has evolved from personalized email campaigns to viral celebrity TikToks. Given this ever-evolving landscape, it's unsurprising 58% of respondents say today's complex network of marketing channels is having a significant or moderate negative impact on their current marketing operations.

"It's one of those situations where there's too much choice," says Marc Gordon, owner of The Marc Gordon Agency, a marketing firm based in Toronto. "Channels used to be very siloed, but now almost everything overlaps so that it's not even a matter of picking a lane. It's picking a lane with the understanding that it will merge with other lanes."

Not surprisingly, marketers are struggling to navigate this challenging terrain. More than half—53%—say their marketing team feels overwhelmed by the amount of channels they need to manage within the media mix. Even efforts to reduce media mix complexity by teaming up with external partners with specialized skills can backfire: 59% of respondents say the need to have specialists who know about each new marketing channel creates complexity for their team. **FIGURE 2**

Technology complexity is also posing difficulties for marketing operations, as indicated by the 55% of survey respondents who say a complex IT stack is having a significant or moderate negative impact on their current marketing operations. From cloud-based customer relationship management systems designed to store customer profiles to generative artificial intelligence (gen AI), which promises to revolutionize content creation, these days, there is no shortage of marketing tools to choose from. But problems can arise from this embarrassment of riches, according to Gene Cornfield, managing director of growth and customer experience transformation at Accenture Song, a New York City–based marketing services firm. Issues include duplicate
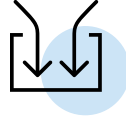
"[Marketing] channels used to be very siloed, but now almost everything overlaps so that it's not even a matter of picking a lane. It's picking a lane with the understanding that it will merge with other lanes," says Marc Gordon, owner of The Marc Gordon Agency.

systems, hidden costs, and marketing teams impeded from creating seamless omnichannel experiences.

And then there's the marketing sector's labyrinthine network of partners, ranging from content creators and agencies to referral partners and affiliates. Nearly half (47%) of respondents cite a complex network of partners as negatively impacting marketing operations significantly or moderately. Only 34% believe they perform "very well" in managing these external partner relationships.
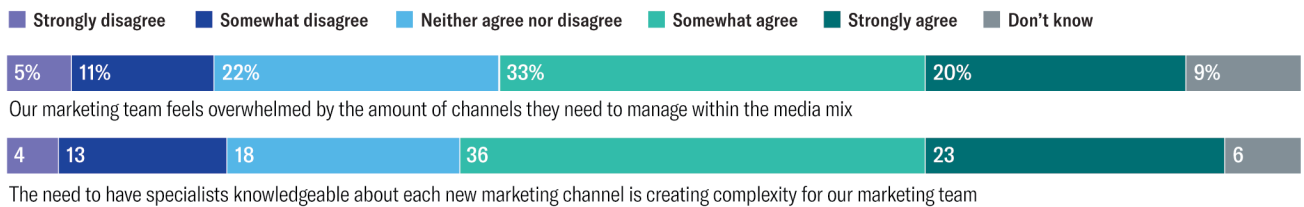
Yet in an effort to acquire expertise and address talent gaps, many continue to look outside their organization for specialized skills: 54% of respondents have contracted new external partners, such as agencies, consultants, and vendors, over the past two years, adding new layers of complexity to their marketing ecosystem.

FIGURE 2

The Downside of Channel Diversity

Today's media mix is negatively impacting many marketers' stress levels

Rate the extent to which you agree or disagree with the following statements.

■ Strongly disagree   ■ Somewhat disagree   ■ Neither agree nor disagree   ■ Somewhat agree   ■ Strongly agree   ■ Don't know

5%	11%	22%	33%	20%	9%

Our marketing team feels overwhelmed by the amount of channels they need to manage within the media mix

4	13	18	36	23	6

The need to have specialists knowledgeable about each new marketing channel is creating complexity for our marketing team

Base: 527 respondents

Source: Harvard Business Review Analytic Services survey, November 2023

"Many CMOs [chief marketing officers] feel vulnerable that they're not working with the right partners," says Jim Stengel, founder of The Jim Stengel Company.

"Marketers are overwhelmed by the potential of external partnerships," says Jim Stengel, founder of The Jim Stengel Company, a Cincinnati-based marketing consultancy. Part of the problem, he explains, is that a heavily populated third-party landscape has made "many CMOs [chief marketing officers] feel vulnerable that they're not working with the right partners."

But for those already experiencing some degree of complexity in their marketing ecosystem, the consequences go beyond a challenging partner selection process. Rather, survey respondents cite a multitude of negative business impacts caused by marketing ecosystem complexity, including difficulty optimizing campaign performance (46%), increased stress for the marketing team (44%), and less impactful marketing initiatives (42%). **FIGURE 3** In fact, among the findings was that laggards are particularly susceptible to having their marketing initiatives compromised by complexity, with 54% citing it as a negative outcome compared to 44% of followers and just 28% of leaders.

Complicating matters further is the fact that 65% of survey respondents say their organizations' marketing teams are struggling with limited marketing budgets. Stagnant or decreased marketing spend will require marketers to reevaluate the way they work—a particularly challenging task for the 44% of laggards who are reluctant to test new marketing channels and technologies.

"The current weight and expectations on a modern marketer's shoulders to do more with less are challenging and confronting for them and the industry because, at their best, CMOs and [chief customer officers] have never been needed more and have never had a broader canvas to positively influence," says Garrett of Deloitte Digital.
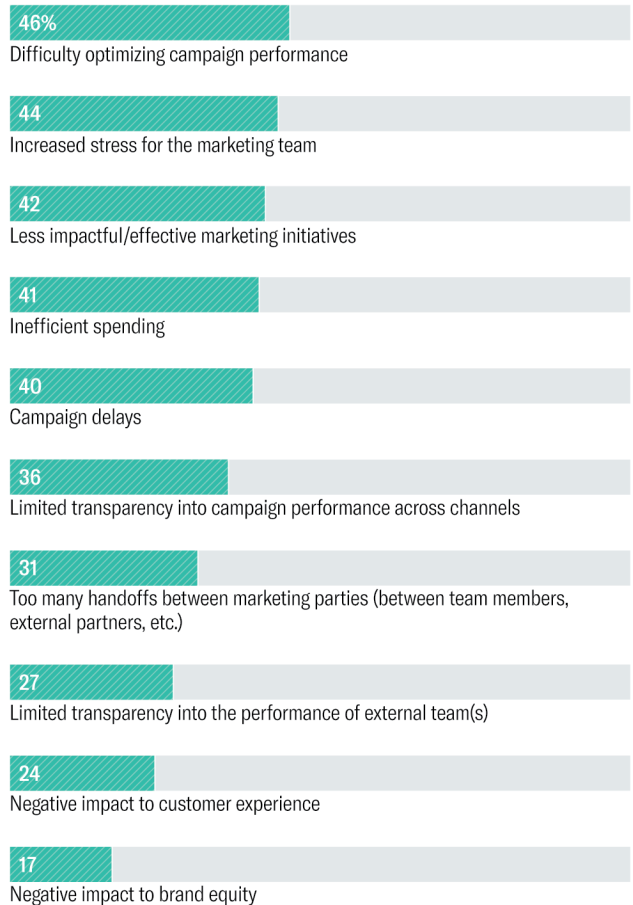
Streamlining and Training

Fragmented technologies and siloed partnerships might be the hallmarks of today's marketing landscape, but marketers

FIGURE 3

The Negative Impacts of Ecosystem Complexity

Compromised campaign performance and increased stress are the most common by-products

What negative business impacts has your organization experienced as a result of complexity within its marketing ecosystem? *Select all that apply.*

46%
Difficulty optimizing campaign performance

44
Increased stress for the marketing team

42
Less impactful/effective marketing initiatives

41
Inefficient spending

40
Campaign delays

36
Limited transparency into campaign performance across channels

31
Too many handoffs between marketing parties (between team members, external partners, etc.)

27
Limited transparency into the performance of external team(s)

24
Negative impact to customer experience

17
Negative impact to brand equity

Base: 489 respondents who say there is some degree of complexity within their organization's current marketing ecosystem; not shown: 5% Don't know, 4% None, 1% Other

Source: Harvard Business Review Analytic Services survey, November 2023

themselves remain closely tethered to the customers they serve—their experiences intertwined and hewn by organized technology systems, well-designed processes, and mutually beneficial partnerships.
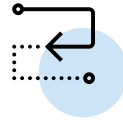
"The more complicated it is to do one's job, often the more complicated it becomes to do that job well," says Jonah Berger, a professor at the Wharton School of the University of Pennsylvania in Philadelphia. As a result, he adds, "the more that marketers can organize their tools and manage

their partnerships effectively, the more value they can provide to customers."

Indeed, 88% of survey respondents agree that when marketing channels are well managed, it creates a better experience for the consumer.

In the hopes of capitalizing on this equation, organizations are exploring new and innovative strategies for reducing marketing ecosystem complexities. For many organizations, the road to improved MX begins with streamlining their end-to-end marketing processes, from conceptualizing an idea to launching that idea in the market. As it stands, only 24% of respondents claim to have "very streamlined" processes in place. In fact, while 49% of leaders report having "very streamlined" processes, only 18% of followers and a mere 5% of laggards can make the same claim. **FIGURE 4**

By establishing efficient methods of engaging consumers through customized content and meaningful messaging, marketers stand to realize significant business benefits. For example, among respondents with somewhat or very streamlined marketing processes, 54% say their organization

FIGURE 4

The Quest for a Streamlined Marketing Process

Leading organizations are more likely to have streamlined end-to-end processes in place

Overall, at your organization, how streamlined is the marketing team's end-to-end process, from conceptualizing an idea to launching the idea in the market? [0-10 SCALE, WHERE 0 IS "NOT AT ALL STREAMLINED" AND 10 IS "COMPLETELY STREAMLINED"]

■ All respondents (total)   ■ Leaders   ■ Followers   ■ Laggards

24%
49%
18%
5%
Very streamlined: 8-10

35
33
46
22
Somewhat streamlined: 6-7

37
12
33
69
Not very streamlined: 0-5

Base: 527 respondents; not shown: Don't know, 4% all respondents, 6% leaders, 3% followers, 5% laggards.

Source: Harvard Business Review Analytic Services survey, November 2023

has achieved greater speed and agility to respond to market trends as a result of having a streamlined and frictionless process for its marketing efforts. Other benefits of streamlined processes cited by these respondents include better customer engagement (53%), better utilization of data (52%), and greater campaign impact (50%).

Data analytics is also playing an increasingly important role in perfecting the marketing journey. For instance, artificial intelligence-powered predictive models can help organizations identify the most effective marketing channels, anticipate shifts in consumer behavior, and segment new target audiences. As it is, 59% of survey respondents are currently increasing or planning to increase their use of data insights to make marketing decisions. **FIGURE 5**

Another strategic step toward improved marketing performance entails boosting an organization's talent pool. However, shoring up the necessary talent to keep pace with fluctuating consumer demands, market trends, channel preferences, and emerging technologies is a tough job in today's labor market. Sixty-one percent of survey respondents cite a shortage of skilled marketing talent as having a negative impact (significant or moderate) on their marketing operations.
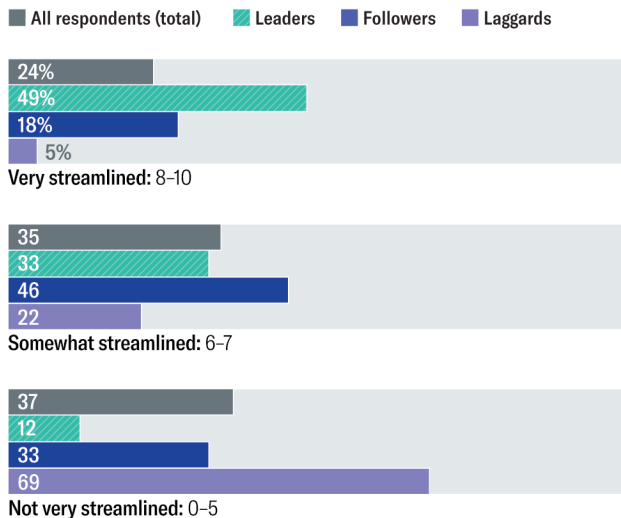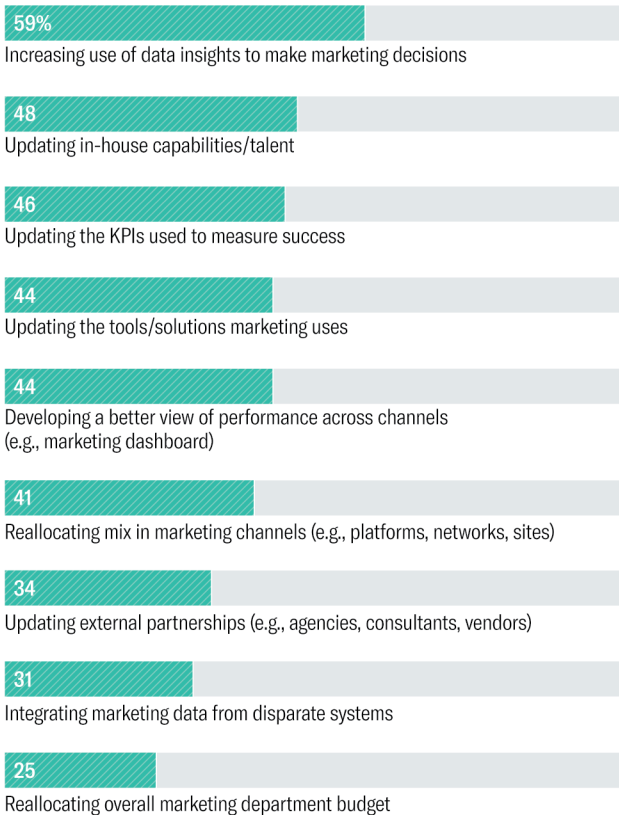
Marketing isn't the only business function hard-hit by the world's limited supply of workers with in-demand skills. But the contributing factors to marketing's labor woes are multifaceted: 33% of survey respondents struggle with increased turnover/reduced retention of talent, closely followed by difficulty recruiting new talent (30%), low workforce morale (21%), and decreased employee productivity (17%). While these challenges are experienced to a similar extent by leaders, followers, and laggards alike, laggards are significantly more likely to be negatively impacted by a shortage of skilled marketing talent than are leaders (74% vs.

> Among respondents with somewhat or very streamlined marketing processes, 54% say their organization has achieved greater speed and agility to respond to market trends as a result of having a streamlined and frictionless process for its marketing efforts.

FIGURE 5

Strategic Steps into the Future

Over half plan to increase their use of data to make marketing decisions

What strategic steps is your organization currently taking, or planning to take within the next 12 months, to improve its future marketing performance? *Select all that apply.*

59%
Increasing use of data insights to make marketing decisions

48
Updating in-house capabilities/talent

46
Updating the KPIs used to measure success

44
Updating the tools/solutions marketing uses

44
Developing a better view of performance across channels (e.g., marketing dashboard)

41
Reallocating mix in marketing channels (e.g., platforms, networks, sites)

34
Updating external partnerships (e.g., agencies, consultants, vendors)

31
Integrating marketing data from disparate systems

25
Reallocating overall marketing department budget

Base: 527 respondents; not shown: Don't know 7%, Other 2%, None of the above 1%.

Source: Harvard Business Review Analytic Services survey, November 2023

45%). Laggards are also less likely than their peers to train and develop their in-house talent. While 59% of leaders have upskilled their existing internal marketing teams over the past two years, only 35% of laggards have done the same.

"Many companies are eager to invest in development of new capabilities and new channels, but that's different than taking their existing employee base and saying, 'We want to make these into the best marketers in the world,'" says Magill of Cohesive.

Companies that are reluctant to improve their internal talent will likely encounter difficulties meeting customer needs.

For this reason, Gordon of Marc Gordon says organizations must take the time to train their new recruits and hone their skills in "understanding what the client wants to say, how to say it, [and] where to say it, and finding different ways to say it so that it appeals to different audiences."

In fact, 48% of survey respondents say their organizations are taking matters into their own hands by strategically updating their in-house marketing capabilities and talent (either currently or within the next 12 months). For many marketers, this means acquiring the technology skills needed to work hand in hand with data analysts. These skills include the ability to decipher data in different formats, understand the techniques used to forecast outcomes, and interpret the dashboards that tell the story behind the data.

"People who want to be marketers now have to understand big data—they have to understand how to analyze it and how to get useful insights from these massive reams of data," says Gerard Tellis, a professor of marketing and director of the Center for Global Innovation at the University of Southern California Marshall School of Business in Los Angeles.

In fact, demand for data-savvy marketers is likely to rise, given that 57% of respondents plan to increase investment in data analytics to improve marketing performance over the next year.

"All marketing activities are now being done with big data," says Tellis, offering the example of how marketers use customer data and behavior analysis to create targeted advertisements. "All of marketing's old strategies are now being driven to a higher level with the large amount of data available."

Other technologies garnering greater investment from marketers in the coming year include marketing automation (33% of respondents) and generative AI for content creation (32%). Adoption of gen AI is still relatively slow, with 37% of leaders planning to increase investment in this innovative technology to improve marketing performance, compared to 35% of followers and 24% of laggards.

"Marketing isn't just content; it's also context," says Gordon. "You're trying to appeal to people's emotions in a way that will lead to action. There has to be a human connection—generative AI isn't there yet."

Taking a Strategic View

Game-changing technologies aside, today's marketers are being asked to deepen their relationships with customers to build trust and longevity. Doing so, however, requires "understanding all aspects of marketing, not just a particular channel or touchpoint," says Magill. "Tools come and go. But once marketers are dead-ended in that way, their perception of marketing experience can plummet."

In addition to developing a broader understanding of marketing's role in an organization, Garrett says, marketing

teams must secure "the business credentials to be able to talk about marketing transformation fluently and what this means for the broader business, how brand is a business strategy not just a marketing strategy, and feel comfortable talking about customer growth and innovation in the boardroom."

But encouraging marketers to play a more strategic role in an organization is a two-way street, especially if the goal is to improve MX. For this reason, Magill says, C-level executives must take the time to "engage marketers in marketing topics and develop marketing strategy alongside business strategy." After all, he adds, "a company can't execute an adequate marketing strategy if the C-suite thinks marketing is just sales support."

Another way organizations can reduce complexities, and thereby improve marketing performance and experience, is by reevaluating their technology toolkit. In some cases, Accenture Song's Cornfield says, "the proliferation of technology and channels has led marketers away from the ability to be as customer centric as they aspire to be." Rather, they find themselves bogged down by technology's bells and whistles and detached from customers' needs and preferences. "The most successful marketers realize their job—and their tools' job—is not to manipulate customers to do what we want, but to help customers do what they want," he adds.

But efforts are underway to course correct: 41% of survey respondents expect one of the primary focus areas of their marketing operations to be on improving the use of marketing channels over the next two years. The same goes for improving the use of advanced data tools, with 41% saying this is a primary area of focus over the next two years for the marketing department. As it is, 44% of survey respondents' organizations are currently updating their marketing tools and solutions or plan to update them in the year to come.

Prioritizing the tools deployed in an organization can also help simplify marketing's IT stack. According to Berger, marketing's wide assortment of "vendors, services, and tools, particularly for managing and analyzing data," can make it challenging for marketers to "figure out where to start."

In response, Magill recommends marketers not only take inventory of their tools but also gauge their effectiveness and whether they're delivering a return on investment.

"Many marketing functions have lagged, not necessarily in their choice of tools for their armory, but rather in how they effectively use these tools," he says. "There's a big difference."

Managing Partnerships

Marketing partner ecosystems are as likely to evolve over time as a company's media mix changes. Indeed, 67% of survey

"The proliferation of technology and channels has led marketers away from the ability to be as customer centric as they aspire to be," says Gene Cornfield, managing director of growth and customer experience transformation at Accenture Song.

respondents working with external partners expect their organization to alter those partnerships in some way this year.

But approaches to simplifying marketing ecosystems vary. On the one hand, external marketing partners offer access to robust technology systems, highly qualified talent, and a breadth of industry experience without any investment required in in-house employee training and development.

"It takes time to grow talent," says Daveeed Wagner, founder of 1marketingidea, a personal branding consulting firm in San Diego, Calif., highlighting one of the many advantages of partnering with a company that "already has marketing systems and processes in place." In fact, 38% of survey respondents say their organization is currently working or planning to work more with external partners with specialized capabilities in the next 12 months.

This increased reliance on external partners should come as a relief to marketers, many of whom are under unprecedented pressure to master every emerging technology and marketing trend in the sector.

"The complexity of the role of marketing is getting worse every year," says Garrett. "Suddenly, marketers are expected to be an expert of content, expert of digital product, an expert of e-commerce, and the list goes on. The successful ones I hope will sit at the center of all things 'customer' and play a curation and collaboration role with other business units."

By outsourcing these roles to a third party, marketers can focus on what they do best without spreading themselves thin. And organizations benefit by not having to invest hefty capital in hiring new talent.

At the same time, however, much like an IT stack, partnerships can become unwieldly and difficult to manage.

Consolidation can help extract some of the complexity from burgeoning marketing ecosystems. Among the modifications being made, 24% are moving projects from external partners to in-house teams in the next year. Ultimately, though,
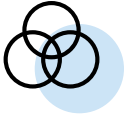
> "If the name of the game these days is excellence of engagement, then you want a marketing team that is very closely tied to the business strategy," says Paul Magill, managing director of Cohesive LLC.

organizations must step back to decide whether seeking the expertise of an external partner or bolstering in-house capabilities is most likely to lead to a positive MX.

Says Accenture Song's Cornfield: "Rather than identify a bunch of marketing capabilities and purchase them from one or multiple vendors, organizations should identify their customers' purpose portfolio—the outcomes customers want to achieve over the course of customer journeys—and then identify experiential improvements that enable customers to achieve those purposes and implement the required capabilities."

Fostering Trust

Updated channels, streamlined processes, data analytics, and consolidated partnerships can uncomplicate marketing, clearing a path for the seamless execution of campaigns and deeper consumer engagement. But marketing isn't designed to function effectively in a vacuum. Rather, it must be carefully intertwined with an organization's goals.

"If the name of the game these days is excellence of engagement, then you want a marketing team that is very closely tied to the business strategy," says Magill. "There is a proliferation of content types and channel types—the only way the marketing team can prioritize these is if they are closely plugged into business strategy."

Providing marketing teams with access to data insights on business operations, from inventory gaps to revenue forecasts, can make them more informed C-suite partners. Ensuring a direct line of communication to senior-level executives can also help marketers set priorities and "be parsimonious about where they put their attention," says Magill.

What's more, even the most strategically aligned marketing initiatives can improve when organizations allow their marketers to experiment with new tools and technologies without fear of retribution for failure.

"Marketers can't rest on the old way of doing things anymore," says Stengel of The Jim Stengel Company. "The consumer is changing very quickly, competitors are popping up quickly, new cultural phenomena are occurring quickly. It's more important than ever that marketers be curious, agile, and willing to shift, pivot, and learn."

In exchange for this agility, organizations must be willing to learn from their marketing mistakes and see them as opportunities to understand customers and provide marketers with more meaningful work.

"If you're a marketer in a company that is intolerant of marketing failing every now and then, you'll be pretty unhappy," says Magill. "Your MX will come down, and because you're no longer innovating in engagement, your CX will also come down."

Conclusion

Technologies such as gen AI and the metaverse are already redefining the marketing landscape, empowering marketers to create content, communicate with customers, and enhance tasks in ways never before possible. But with the arrival of any new technology comes the introduction of new tools, each promising to optimize a technology's capabilities and revolutionize industry. Next, before marketers can even begin to distinguish one tool from the next, a sprawling network of third-party players emerges with customized services and consultants at the ready. Confronted with such overwhelming opportunities, it can be easy for marketers to overlook what is most important.

"It's not about executing marketing at greater scale," says Cornfield. Rather, he says, "it's about developing stronger human relationships at greater scale." Because by doing so, organizations can likewise nurture better experiences for marketers and their clients that are built on meaningful work, seamless processes, and mutually beneficial outcomes.

Harvard Business Review Analytic Services surveyed 527 members of the *Harvard Business Review* audience via an online survey fielded in October 2023. Respondents qualified to complete the survey if they were involved in their organization's marketing decisions, or if they were a marketing consultant who advises on clients' marketing.

Size of Organization

31%
10,000 or more employees

34%
1,000-9,999 employees

12%
500-999 employees

24%
100-499 employees

Seniority

30%
Executive management/ board members

34%
Senior management

23%
Middle management

13%
Other grades

Industry Sectors

15%
Technology

10%
Manufacturing

9%
Education

8%
Financial services

All other sectors less than 8% each.

Job Functions

19%
Marketing/PR/ communications

10%
Operations/ product management

9%
General/executive management

9%
Sales/business development/ customer service

All other functions less than 8% each.

Regions

44%
North America

21%
Europe

20%
Asia Pacific

8%
Middle-East/Africa

7%
Latin America

Figures may not add up to 100% due to rounding.