

Predictions 2015: CMOs Boldly Reach For More Influence In The Enterprise

More Internal Influence Will Require Marketing Optimization

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WHY READ THIS REPORT

It's the middle of the decade, and chief marketing officers (CMOs) find themselves in the middle of a dilemma. The CMO role has yet to emerge fully from its historical communications, promotion, and lead management functions. But the pressures on organizations to become customer-centric have never been greater, creating an unprecedented need to understand customers much better than before. It's time for the CMO to meet that need: Forrester believes that in 2015, CMOs should step forward and take responsibility for turning the enterprise toward the customer. This means taking on a more significant role on the executive team and collaborating with chief information officers (CIOs) more fully. It also practically begs CMOs to lead innovation processes in the organization and means that the whole company — starting with the CMO — has to identify places where technology can create a more engaged customer relationship. Getting the organization to see the CMO in this light is a big ask, and only CMOs who rethink their approach to marketing operations will pull it off. In this report, Forrester predicts seven things that CMOs will do to lead the enterprise to greater customer obsession and success.

CMOS CLAIM THE ROLE OF HOLDER OF THE KEYS TO THE CUSTOMER

The pressures are many and unprecedented: Digital devices and platforms are changing the way customers think and act. But nobody in the traditional enterprise has clear responsibility for responding to these changes and marshaling emerging digital tools to deliver a better customer outcome. CMOs sit at the executive table but have historically been seen as a necessary customer-facing cost center. In 2015, it's time to turn customer-facing into customer-obsessed, evolving the CMO role and turning it into an engine that fuels company growth. Our research has shown that these evolved CMOs already recognize the need to cultivate the trust, respect, and collaboration across the entire C-suite to prosper.¹ Now, it's time for CMOs to take that position of trust and respect and use it to ask for the right to not only hold but also turn the keys to the customer.

Prediction No. 1: CMOs Insist On Taking Charge As A Full Corporate Officer

CMOs' responsibilities won't grow beyond those of a "chief marketer" unless CMOs step up to lead the shift to customer obsession. In 2015, CMOs who are skilled in digital, immersed in data-based customer insights, and able to blend brand and exceptional customer experiences will become primary business leaders across product design, sales, service, and operations. This increase in CMOs' stature and credibility in the enterprise can only be accomplished by:



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- **Helping the CEO see marketing as a strategic source of business growth.** With the cost cutting of the recession behind them, chief executive officers (CEOs) will wake up and concur with the CMO's long-held customer vision to drive business growth, giving the CMO the chance to become an advisor to the CEO in business strategy development. We expect to see CMOs follow the lead of frontrunners such as Andy Childs, vice president (VP) of marketing at Paychex, who, in addition to functional marketing responsibilities, influences overall business strategy by directing strategic planning and mergers and acquisitions activity.²
- **Initiating the enterprise-wide shift to a customer-centric culture.** Bringing their knowledge about customers, markets, and competition to bear, CMOs will champion efforts to build a customer-centric organization culture, uniting all organization functions around a common set of principles and practices that build tighter customer relationships and differentiated experiences. To succeed, CMOs will add change management skills to their repertoire and gain recognition as an organization change agent. However, to make a customer-centric culture pervasive at all levels of the organization, CMOs will partner with their chief human resources officer (CHRO) to align objectives, targets, rewards, and recognition with customer needs.
- **Accepting responsibility for defining the customer experience across the enterprise.** In 2015, CMOs will act on our research that demonstrates the strong relationship between the quality of customer experience and brand loyalty measures by unifying customer experience under their remit.³ The onus will fall on CMOs to use customer experience methodology and tools as well as customer understanding to merge brand, marketing, and companywide functional interactions into a unified organizationwide customer experience strategy.⁴

What it means: CMOs' stature and influence in the organization will grow as CEOs lean on them for the customer insights needed to inform business growth strategies. CMOs will leverage their new stature to seek mentorship from their CEO, further expanding their leadership potential. To give this partnership time to develop and bear fruit, we expect typical CMO tenure to reach 60 months. As the role of the CMO expands in both operational reach and prestige, corporate boards will take notice and tap CMOs to fill empty board seats, aware that they need someone with proven ability to turn customer knowledge into business growth.

Prediction No. 2: CMOs And CIOs Will Pool Their Resources To Master Data

A leader with a seat at the executive table knows how to collaborate with C-suite peers. But the tension in the air between CMOs and CIOs in some organizations is thick enough to cut with a knife. That relationship can't be healed overnight, but it can be significantly improved by focusing on a shared problem — the resolution of which would deliver results for both parties. Enter the data challenge. Existing data systems were designed to support siloed needs. Frustrated CMOs can't create the unified view of customer behavior they need to drive business actions. In 2015, CMOs will abandon efforts to find a workable solution on their own and seize the opportunity to

truly collaborate with their CIO colleagues. The outcome will be an integrated data strategy and architecture to transform disparate touchpoint data into an end-to-end view of customer behavior. To succeed, CMOs must:

- **Extend an olive branch to the CIO.** The work of the CIO is transforming from an information technology (IT) agenda focused on cost containment to a business technology (BT) agenda delivering technology that wins, serves, and retains customers.⁵ In 2015, CMOs will acknowledge the importance of the BT agenda and its focus on the enterprise technology required to deliver a full picture of customer engagement. To establish new competitive advantage, CMOs will champion and even cosponsor CIO initiatives to accelerate the implementation of the BT agenda across the enterprise.
- **Organize and unify data to create a clear view of the customer.** CMOs have painfully learned that making sense of the messy data trapped in back-end systems of record and customer-facing engagement systems can seem like a steep mountain to climb. To overcome roadblocks and gain the insights they need, CMOs will seek CIOs' guidance to link these systems together. In 2015, we expect CMOs to follow the model set by Dell CMO Karen Quintos and former CIO Adriana Karaboutis who created a collaborative data analytics strategy, consolidated data in one place, provided a single view of the customer, and created a self-service data infrastructure with near-real-time data access.⁶
- **Grab the opportunity to rethink outsourced data management practices.** As a matter of convenience, CMOs have relied on data service providers such as Axiom, Experian Information Solutions, and Equifax to unify their disparate databases and execute the optimized marketing messages that today's empowered customers now demand. As the BT agenda forces the unification of the enterprise technology backbone to support a single customer view, CMOs will consider bringing some data managed outside of the firm back into the company to support the CIO's reconsideration of these systems. This will change what CMOs need from data service providers like these, making 2015 the year that these firms will compete with each other to show that they are most able to support an internally owned data strategy.

What it means: To partner with their CIO peers and advance the BT agenda, CMOs will shore up needed data and analytic skills. They will turn to executive education programs such as The CMO Advantage: Evolving Beyond the Digital Revolution, a joint-venture between IBM and University of Pennsylvania's Wharton School. With confidence in their data skills, CMOs will abandon the narrow silos of digital data derived from their point marketing engagement channels and glean broader insights from a comprehensive view that systems of engagement and systems of record provide. That view can't be achieved without aligning CMOs and CIOs on this focused, but fundamental, task.

Prediction No. 3: CMOs Will Grab The Reins Of Customer-Centric Innovation

Partnership with the CIO is necessary but not sufficient to get a company to engage in cross-silo innovation. Embracing their new leadership role as keeper of the keys to the customer, in 2015, CMOs will claim customer-centric innovation as their remit. This will upset many in the organization who also want to claim the role of innovator but typically don't do much with it. To ensure that potential naysayers see their own interests represented in CMOs' efforts and therefore choose to willingly cooperate, CMOs must:

- **Explain that we are in the age of the customer.** Most senior executives learned the term "customer-centric" during a time when customers had zero power. In the age of the customer, that power dynamic has flipped, and customers can get better information, more options, and more convenient alternatives to meet their needs in an instant.⁷ By 2015, halfway into the most digitally disruptive decade, customer-centric innovation is no longer a luxury; it's a necessity. And CMOs should take on the burden of this urgency for the customer's sake.
- **Point to the wave of ongoing technology change about to hit.** Mobile is a big deal, and smart companies are right to focus on it. But mobile is not even close to the last thing that will disrupt your customer's experience. Apple Watch, Moto Hint, Google Glass 2.0, and devices that haven't been revealed yet — but will be during 2015 — will all create new opportunities to serve business-to-business (B2B) and business-to-consumer (B2C) customers in their micro moments of need.⁸ All CMOs should lead their executive teams through a potentially terrifying exercise by asking: "What does our product or category look like on an Apple Watch, and how can we test that in 2015?"
- **Aim to deepen the customer relationship, not the customer's brand awareness.** When you say that you want to engage customers, colleagues who haven't caught on to your push for customer-centric leadership will roll their eyes and think it's marketing speak. Make sure that they understand that you're not talking about branding; you're talking about building a data-based digital bridge to the customer. Insist that every innovation project explicitly brings you closer to a direct measurable relationship with the customer — one that generates data and insight that can be used to iteratively refine the offering and reapproach the customer.⁹
- **Support innovation wherever it is most likely to succeed.** The CMO can draw on customer knowledge to identify specific customer situations that need to be fixed — in-store, online, in the warehouse, or wherever — and prioritize which ones require the use of a formal innovation process to address. Whichever team is closest to that customer access point must own the innovation exercise, even if it's outside of the CMO's span of control. Prove that you support these needed improvements in the customer's experience by assigning CMO resources to tasks in operations, digital, or sales as needed.

What it means: There are various organizational approaches to innovation, and no single one will address every possible customer need. CMOs should determine whether marketing innovation labs are appropriate for their organizations and how broadly they can apply.¹⁰ They should also consider emulating companies like Wal-Mart and McKesson that invest in startups to stay close to innovators and have the organizational freedom to pursue promising solutions outside of company walls. The CMO must catalog these and other innovation options and then recommend which approaches to use, when to use them, and how to measure their success.¹¹

Prediction No. 4: CMOs Will Champion Technology Inside And Outside Of Marketing

CMOs have been slow to take on the technology leadership mantle. When asked about their perceptions of technology, only 27% of CMOs felt that “technology awareness” was an important factor in their personal success.¹² We’ve got news for them: With so much technology change coming, no CMO seeking to make her role more strategic will get very far without conspicuously advocating technology-based transformation. To prove to the rest of the C-suite that they know what’s going on, CMOs will have to champion a customer-centric technology strategy inside marketing first and then across the board because:

- **Fragmented tech products inhibit the ability to win, serve, and retain customers.** Because technology strategy was largely designed to automate existing processes, not transform business practice, much of marketing technology has been sourced, bought, and implemented to perform isolated marketing tasks: sending out emails, monitoring social media, and developing analytical models, among others. These point products litter the BT landscape. But automating discrete tasks is not as important as automating the process of building customer engagement across the life cycle. Of course, smart CMOs will use 2015 to connect the dots between the technologies, but they will more importantly engineer the engaging experience that empowered buyers expect.
- **Digital experience is the driver of customer experience.** In the early digital days, organizations placed control of digital touchpoints like websites or mobile platforms in the CIO’s organization to align with the style of management of other channels or customer access points — in silos. These different channels created different experiences, making a company a many-headed Hydra to the customer. Today’s digital tools, however, promise to give customers a single relationship with a company, a relationship owned by the CMO. But this will only occur if the CMO has the tech smarts to step up and own that single relationship, partnering with the CIO to bring the BT agenda to life, tying together all of the digital technologies to make it happen.
- **Inevitable vendor consolidation turns product decisions into platform decisions.** The traditional tech titans like Oracle and IBM will continue to fortify their marketing arsenals with innovative niche solutions in domains like content marketing, mobile, predictive analytics, gamification, and more. At the same time, companies such as salesforce.com and Adobe that

have been traditionally providing point marketing solutions will rapidly expand their portfolios to serve broader CMO needs.¹³ Where CMOs were just getting comfortable making isolated technology decisions, now these choices have platform-level architecture, infrastructure, and integration implications that can become instant legacy because they are so difficult to change.¹⁴ Good thing for CMOs: They will have strengthened ties with CIOs to advance the BT agenda because these two roles will have to make these tough platform calls together.

What it means: A CMO does not need to become a technologist to lead this transformation any more than a customer has to become a nerdy superuser to get the most from his mobile experience. Internal relationships will be key here. Obviously, the focus on the BT agenda with the CIO will set the right tone, but you'll need to find a source of honest advice to help you quickly discern vendors and technologies that confer real advantage from those that will merely distract you. Use Forrester analysts, peers in the industry, and the most level-headed technology enthusiasts in your team for that initially. Ultimately, you will need to hire a marketing technologist who can advise you on technology strategy, facilitate collaboration with those leading the BT agenda, and help the rest of the marketing team take full advantage of emerging technology. Find the right person as quickly as you can, but define the role carefully. And note that this person will be as important to you as to the CIO.

SUSTAINED CUSTOMER ENGAGEMENT DEMANDS OPERATIONAL EXCELLENCE

A CMO who successfully elevates her role to the level of influence we describe will soon find that while being technology-forward can lift her to these heights, maintaining altitude requires operational excellence. A focus on operational excellence has historically been used to manage costs, but in the age of the customer, customer-obsessed operational excellence will enable the kind of growth that the CEO will now turn to the CMO to achieve. In 2015, CMOs will rally the organization around winning, serving, and retaining customers as efficiently as possible. Rallying the organization this way requires specific changes to the organization that will affect how decisions are made, how success is measured, and what role outsiders like agencies will play.

Prediction No. 5: CMOs Will Stop Delaying A Shift To A Customer-Centric Organization

Dramatic changes in customer buying behavior will force CMOs to tear down their organizational silos and prioritize customer relationships over marketing channel performance. A more flexible customer-centric model that we call a marketing operating system (MOS) framework will push aside marketing-channel- or product-silo-based models.¹⁵ CMOs who transition to MOS-based designs will better engage customers by increasing cross-channel collaboration and enhancing organizational adaptability. In 2015, we expect that:

- **CMOs will erode prior siloed marketing structures.** In 2015, CMOs will task their marketers to acquire knowledge about specific customers in specific need states, challenging them to define the best ways to engage those customers across channels. They will then dedicate the right mix of channel- or product-based employees to collaborate in service of those specific customers to produce optimal results. This will give marketing personnel confidence that cross-silo approaches are both effective and efficient, just as the CMO needs them to be open to a formal reconsideration of the structure.
- **Twenty percent of organizations will fully implement a MOS-based organization design.** Implementing a MOS-based organization is more than just moving labels around an organization chart. Not all organizations will be ready to transform how they do their work. In 2015, we expect CMOs who have motivated marketers to break out of their siloed comfort zones will take the next step and implement a MOS-based structure. Those CMOs will follow in the footsteps of CMOs from HSN, Erie Indemnity, and T. Rowe Price who have turned their vision into an organizational reality.
- **Marketing operations leaders will ascend to run marketing as a business.** CMOs will recognize the need for a strong marketing operations function to connect the dots of the buyer's journey across channels consistently. Acting as CMOs' chiefs of staff, marketing operations leaders will emerge with a broad remit for marketing performance measurement, strategic planning, budgeting, process development, and project management. There will be some tussle between customer insights professionals and others on the CIO's team as everyone tries to figure out whose job it is to turn data into decisions. We won't call the fight in favor of marketing operations leaders just yet, but as a side effect, we predict membership in the Marketing Operations Cross Company Alliance (MOCCA), the leading association for marketing operations professionals, to double as these leaders seek best practices and peer support.¹⁶

What it means: CMOs must shift their organizations from a structure designed for an era that no longer exists to an integrated, collaborative, and customer-centric model. The age of the customer simply won't tolerate otherwise. To avoid the abysmal failure rates of many enterprise transformational initiatives, CMOs will become change management masters, providing a clear vision of the customer-obsessed end state, setting realistic expectations, and modeling the desired team behaviors. To motivate cultural changes, CMOs will partner with their HR counterparts to create the performance metrics that shape how people, processes, and technology will work together to win, serve, and retain customers.

Prediction No. 6: CMOs Will Make Customer Engagement A Top-Three Success Metric

With a more responsive marketing organization in place, CMOs can expand beyond customer acquisition to focus on building deeper digital relationships in the later phases of the customer life cycle. CMOs will place increased effort on delivering an experience that meets customer needs and over time grows the company's share of wallet. Revenue goals aren't going away by any means, but increasingly we'll see that:

- **Current-customer engagement metrics top the CMO's dashboard.** The marketing funnel creates a single-minded focus on feeding pipeline that remains entrenched in many firms today. Only 22% of CMOs focus on retention as a top priority, compared with 63% who make acquisition a lead priority.¹⁷ As brand and customer experience converge, CMOs will adopt the customer life-cycle model to retain and grow their existing numbers of customers by creating additional customer value. The increased focus on the customer's total experience will drive retention to a top-three priority for more than a third of CMOs in 2015.
- **Digital shifts from tactical to relationship-building communications.** CMOs have embraced the measurable efficiencies of digital channels to connect with their customers. Seventy percent of B2B firms planned to increase digital spend in 2014, as did 52% of B2C marketers.¹⁸ CMOs will focus on creating the experiences that have the greatest impact, with mobile leading the way. Impressive experiences such as Marriott's virtual-reality tours of premier destinations like Hawaii will give way to less sexy but more useful experiences in the customer's mobile moment of need.¹⁹ Starwood Hotels & Resorts Worldwide, for example, offers mobile-driven keyless room entry that enables time-strapped loyal customers to bypass check-in. Such relevant experiences not only are more frequent but also generate valuable, measurable customer interaction data.
- **Even messaging gets measured like a type of engagement.** Content marketing is a hot topic: Its share of 2014 budgets reaches into double digits for the first time.²⁰ Engagement-focused CMOs, however, realize that this is not just a new kind of advertising — it's a form of messaging that engages the customer more deeply. From crowdsourcing content in a way that links with customers directly to building complex content storylines across long-form content like Dr Pepper's "1 Of A Kind: Justin Tucker" web ad or General Electric's GE Reports, marketers will use content marketing not only to reach people but also to connect with them, measuring that connection wherever possible.²¹

What it means: Now that CMOs will have an organization capable of delivering and measuring long-term customer engagement rather than just customer acquisition, the connection between customer engagement and direct revenue will finally become clear. Smart CMOs will make depth of customer engagement their personal secondary metric in support of the business growth. CMOs at B2C firms with a business model historically focused on services or customer loyalty can take the lead here, but every product firm will ultimately make a play for deeper

digital customer relationships. Even consumer packaged goods firms will experiment with opportunities to create measurable individualized experiences, as L'Oréal's Makeup Genius app is already doing. The app turns an iPad camera into a makeup mirror that allows consumers to virtually try on more than 300 cosmetic products or try one of 16 curated looks.

Prediction No. 7: CMOs Will Push Agencies To Serve Them More Strategically

Armed with the right organization and metrics, CMOs will reevaluate the resources they currently use to serve customers. To deliver a connected brand and customer experience, CMOs will transition to emphasis on not only channel-focused teams but also the specialist agencies that serve them. Agencies will scramble to show that they can keep up. The result will be a new set of mission-critical agency asks because:

- **Supporting the building of a connected brand experience will become job No. 1.** CMOs will evaluate agencies based on their ability to help build trusted, remarkable, unmistakable, and essential (TRUE) brand experiences.²² Such experiences require crafting and distributing a connected brand story or delivering technology to drive a connected brand experience across physical and digital channels. Home Box Office (HBO) tapped Huge to make the brand both essential and remarkable by developing and deploying the HBO Go experience across eight platforms, leading to 30% growth in HBO Go active users in 2013.²³
- **Digital-first agencies will increasingly take over traditional agency roles.** With digital serving as both a driver and a potential disruptor of the business, CMOs will tap agencies with a digital-first mindset to lead overall brand strategy and broader creative assignments. Digital-first agencies like R/GA and Huge lead integrated creative strategy and production. R/GA produces traditional 30-second TV ads for brands like Beats Music, and Huge designs and produces the outdoor advertising for Google Shopping Express. VML, a digital agency owned by WPP, won the agency of record assignment for National Auto Parts Association, which includes digital, TV, print, and sponsorship.²⁴
- **Marketing technologists will play a bigger role in agency relationships.** With an expanded role to manage, CMOs will delegate even more of their responsibilities — including agency selection and management — elsewhere in the organization. While the VP of marketing, advertising, or digital manages most agency relationships today, this will change as agencies are required to provide technology support that integrates with the overall technology strategy that the marketing technologist manages.

What it means: Already under pressure to prove that they can help manage digital customer relationships, agencies will struggle throughout 2015 to differentiate themselves and appeal to eager CMOs. Traditional agencies will strengthen their digital offerings through a consolidation of digital services and people, like Young & Rubicam's recent appointment of a former group

strategy director at R/GA to chief strategy officer in its New York office.²⁵ Digital agencies will have to go the other way, augmenting customer experience capabilities with traditional brand and creative skills. Newly focused on metrics, CMOs will push agencies to report evidence that agency activities meet stated customer goals. To meet this need, SapientNitro added data visualization and infographics to its business intelligence unit. It delivers results in an easy-to-navigate iPad-accessible dashboard. If you don't get the message yet, CMOs, your elevated role in the C-suite makes you the most interesting executive in the room as far as these agencies are concerned. Make them earn your attention.

ENDNOTES

- ¹ Forrester and Heidrick & Struggles fielded a global survey of 212 CMOs in July 2013 to assess their current remit and how they prove their value as business and strategy leaders. Please see the February 24, 2014, "[The Evolved CMO In 2014](#)" report.
- ² In response to our survey, CMOs recognized their need to step up as business leaders. The data indicates that they are paying more attention to their own business skills, how those skills are communicated to their C-level peers, and how that relates to the organizations they run. Andy Childs is one best practice example of CMOs taking on additional responsibility to expand their business impact. Please see the February 24, 2014, "[The Evolved CMO In 2014](#)" report.
- ³ Forrester's consumer research confirms the strong relationship between the quality of a brand's customer experience and loyalty measures like willingness to consider the brand for repeat purchase and likelihood to recommend the brand. But in many organizations, brand building and customer experience are disconnected, leading to a fragmented brand experience. CMOs must make customer experience align with marketing communication strategies to ensure the consistency of the brand and overall customer experience. Please see the May 6, 2014, "[How To Build Your Brand Through Customer Experience](#)" report.
- ⁴ In the age of the customer, successful enterprises have already figured out that the surest way to win, serve, and retain customers is through improving the customer experience. Our research shows that customer experience is the path to organization profitability. Years of Forrester data confirm the strong relationship between the quality of a firm's customer experience and loyalty. And loyal customers spend more, advocate to others, and are less costly to acquire, resulting in better financial outcomes. Please see the July 9, 2014, "[How To Make The Case For Customer Experience](#)" report.
- ⁵ To provide differentiated customer experiences, firms must build systems of engagement from the outside in, according to how customers move in market spaces. If CIOs can move beyond the traditional information technology focus on technology assets and adopt an expanded view that centers on customer experience and choice, CIOs can elevate their role in and impact on the business. Forrester defines the BT agenda as the to-do list across roles for applying technology, systems, and processes to win, serve, and retain customers. Please see the November 15, 2013, "[The CIO Mandate: Engaging Customers With Business Technology](#)" report.

⁶ For two days at our 2013 Forrester's Forum For CMOs And CIOs in Napa Valley, California, 100 CMOs and CIOs engaged in a conversation about the roles each of them play in helping their companies win in the age of the customer. Three companies in particular — Dell, GE Oil & Gas, and Alcon — typify some of the ways that this relationship can drive growth for the enterprise. Please see the November 13, 2013, "[Quick Take: Three Ways That The Right CMO-CIO Partnership Can Pack A Powerful Punch](#)" report.

⁷ Empowered customers are disrupting every industry; competitive barriers like manufacturing strength, distribution power, and information mastery can't save you. In this age of the customer, the only sustainable competitive advantage is knowledge of and engagement with customers. See the October 10, 2013, "[Competitive Strategy In The Age Of The Customer](#)" report.

⁸ Customers' mobile moments of need are rapidly being multiplied, creating micro moments of need, which are those tiny fractions of time when a customer has a need that you can fill, but only if you serve that need in that moment in the most convenient way possible. See the September 8, 2014, "[Micro Moments Are The Next Frontier For Mobile](#)" report.

⁹ It's time to build your digital customer relationship before someone else connects more deeply with that customer. See the January 22, 2014, "[Start To Build Your Ultimate Customer Relationship](#)" report.

¹⁰ Companies like Comcast and Nestlé are building innovation labs to accelerate how they create new ways to reach and serve digital customers. To determine whether a lab is right for your organization, please see the December 2, 2013, "[The Costs And Benefits Of Marketing Innovation Labs](#)" report.

¹¹ Organizing for digital disruption requires a full assessment of a company's cultural, structural, and procedural strengths and weaknesses. To learn what obstacles your company must overcome and how to organize to generate digitally disruptive innovation, please see the October 31, 2013, "[Organizing For Digital Disruption: Where And How To Ignite The Disruption You Need](#)" report.

¹² But 54% of them had the sense to realize that "technology awareness" is a competency or skill that offers them the most opportunity to improve. At least they know what they need to fix about themselves. Source: Forrester's Q3 2013 Forrester/Heidrick & Struggles Evolved CMO Global Online Survey.

¹³ For more information on these vendors, see the October 21, 2014, "[The Forrester Wave™: Enterprise Marketing Software Suites, Q4 2014](#)" report.

¹⁴ The marketing technology landscape continues to evolve, making CMO decisions much complex. Please see the June 13, 2014, "[Let's Revisit The Enterprise Marketing Software Landscape \(Again\)](#)" report and see the October 21, 2014, "[The Forrester Wave™: Enterprise Marketing Software Suites, Q4 2014](#)" report.

¹⁵ CMOs must shift their organizational design from product-centric or channel-centric models to a structure crafted to best serve the whole customer, whether they define it at the account level or in service of individuals. Forrester believes the organization framework we call a marketing operating system will permit CMOs to develop more flexible and more customer-aware marketing teams. Please see the May 6, 2014, "[Reboot Your Organization for Modern Marketing](#)" report.

¹⁶ MOCCA is now the largest group of marketing operations professionals in the country. The organization focuses on providing education and thought leadership — connecting marketing operations leaders through executive forums, career development events, networking, and job boards and supporting a forum for best practice sharing. Source: Marketing Operations Cross Company Alliance (<http://www.mo-cca.com/about>).

¹⁷ According to our survey, CMOs maintain a broad range of responsibilities for overall marketing functions — from marketing strategy, brand, and customer/market insights to pipeline management across the path to purchase as well as digital, eCommerce, and marketing technology. Source: Forrester's Q3 2013 Forrester/Heidrick & Struggles Evolved CMO Global Online Survey.

¹⁸ See the December 12, 2013, "[B2C Marketers Must Turn Fragmented Marketing Budgets Into Business Budgets](#)" report and see the January 21, 2014, "[Focus B2B Marketing Budget Gains On Business Outcomes To Succeed In 2014](#)" report.

¹⁹ Forrester believes we are witnessing a mobile mind shift — "the expectation that I can get what I want in my immediate context and moments of need." See the June 3, 2014, "[The New Mobile Mind Shift Index](#)" report.

²⁰ Content marketing is the new black, and budget survey respondents expected to spend a fairly sizable 12% of B2B budgets, and 6% of B2C, producing various forms of information for customers to consume. See the December 12, 2013, "[B2C Marketers Must Turn Fragmented Marketing Budgets Into Business Budgets](#)" report and see the January 21, 2014, "[Focus B2B Marketing Budget Gains On Business Outcomes To Succeed In 2014](#)" report.

²¹ Source: YouTube (<http://www.youtube.com/watch?v=v3tiMrkqaEE>) and General Electric (<http://www.gereports.com/>).

²² In the age of the customer, CMOs battle to build their brands with distracted, technology-empowered consumers. In this new era, CMOs must shift from simply managing a brand to leading the new brand experience — and from a company-centric mindset that regards brands as a controllable asset to a customer-centric view that focuses on creating an emotionally resonant brand experience that transcends product and service transactions. Please see the September 3, 2014, "[Brand Experience Redefines Brand Management](#)" report.

²³ Source: Maureen Morrison, "VML Snags Napa Auto Parts Account," Advertising Age, December 23, 2013 (<http://adage.com/article/agency-news/vml-picks-napa-auto-parts-account/245834/>).

²⁴ Source: Amol Sharma, "HBO More Profitable Than Netflix, but Slower-Growing," The Wall Street Journal, February 5, 2014 (<http://online.wsj.com/news/articles/SB10001424052702303496804579364441588141618>).

²⁵ Source: Andrew McMains, "Y&R Finds New Top Planner at R/GA," AdWeek, September 18, 2014 (<http://www.adweek.com/news/advertising-branding/yr-finds-new-top-planner-rga-160209>).