

AI Analysis

Unlocking ROI: Where Marketing and Finance Align

Joanna Buchholz
Managing Director, Deloitte

Summary

The session discussed the complexities of integrating marketing and finance to unlock ROI. The speaker emphasized the importance of aligning top-down and bottom-up processes, ensuring that marketing, sales, and finance teams speak the same language and systematically connect their plans to organizational goals. This involves using AI in tactic planning, automating shared calendars, and establishing marketing governance councils to reinforce accountability and streamline processes. The speaker highlighted the value of friction within organizations as a means to improve collaboration and drive better results, and stressed the necessity of having consistent taxonomies and measurement frameworks to facilitate accurate data comparison and decision-making across teams and regions.

The speaker also underscored the significance of technology in enhancing planning and execution processes. By integrating planning platforms with execution and workflow management tools, digital asset management solutions, and procurement systems, organizations can achieve more accurate and efficient planning cycles. The speaker provided examples of clients who have benefited from such integrations, resulting in time and financial savings, improved data accuracy, and better compliance. They discussed the challenges of manual data reconciliation and the importance of automating these processes to ensure data consistency and support marketing finance and operations.

In the final part of the session, the speaker focused on the importance of having a robust measurement framework that connects enterprise goals with operational performance. They explained how marketing mix modeling and multi-touch attribution can be used to measure incremental sales and return on advertising spend. The speaker emphasized the need for continuous scenario planning and testing to refine strategies and achieve better results. They recommended creating dashboards with real-time budget tracking, confidence intervals, and pacing reports to facilitate informed decision-making. Ultimately, the session highlighted the need for low-friction processes and integrated technology ecosystems to enhance planning, execution, and measurement in marketing and finance.



Takeaways

Alignment of Marketing and Finance Is Crucial

The session emphasized the importance of aligning marketing, sales, and finance teams to unlock ROI. This alignment ensures that all teams speak the same language and systematically connect their plans to organizational goals, which leads to better collaboration and results.

Integration of Technology Enhances Planning and Execution

Integrating planning platforms with execution and workflow management tools, digital asset management solutions, and procurement systems can streamline processes, improve data accuracy, and achieve time and financial savings. Automating these processes ensures data consistency and supports marketing finance and operations.

Robust Measurement Frameworks Drive Better Decision-Making

Having a robust measurement framework that connects enterprise goals with operational performance is essential. Continuous scenario planning and testing, along with real-time budget tracking and confidence intervals, facilitate informed decision-making and help refine strategies for better results.



Summary powered by



voxoevent.ai