

INBOUND

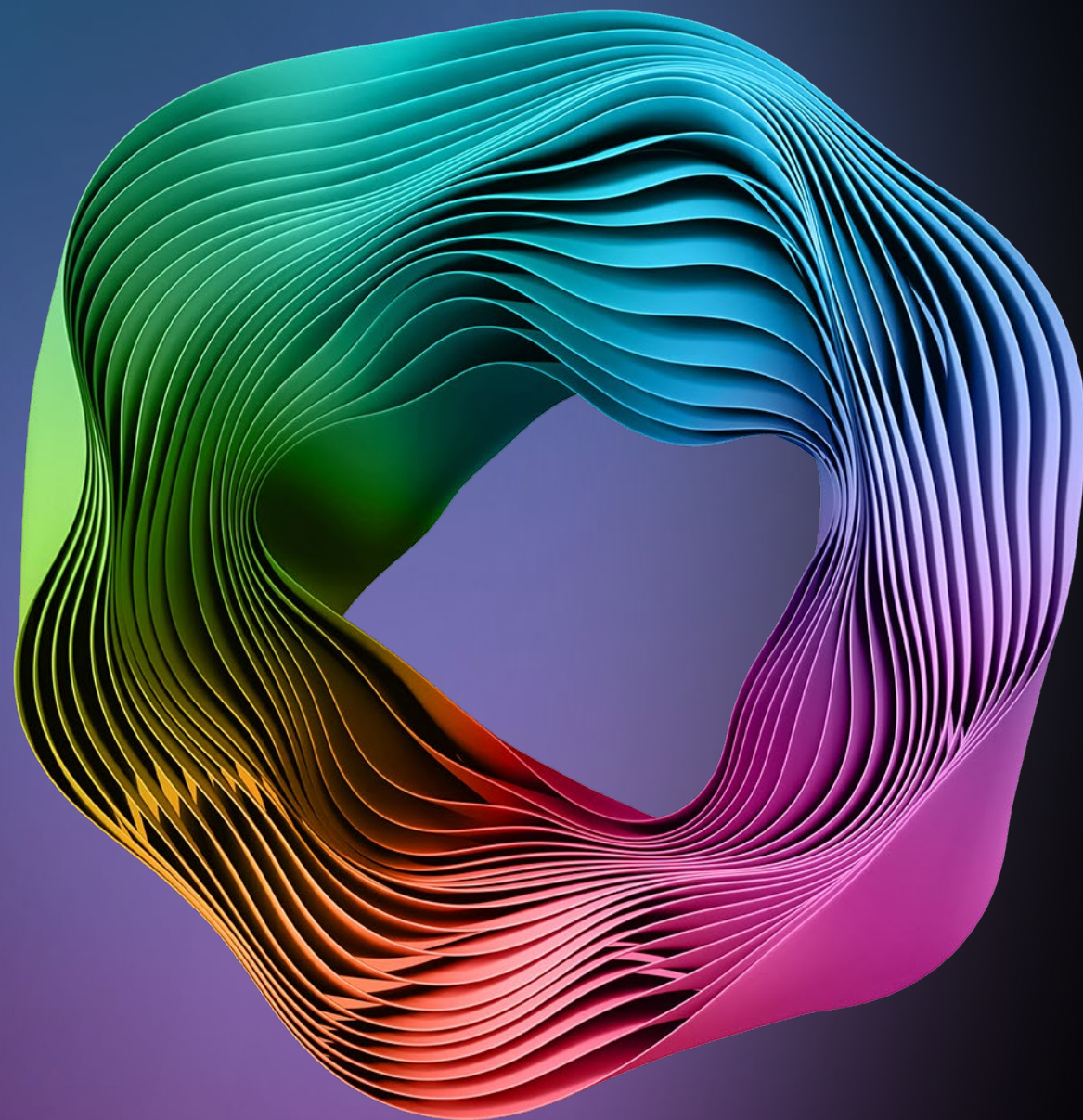
Unlocking ROI Where Marketing and Finance Align

Joanna Buchholz

September 5, 2025

Agenda

- 1** Welcome & Context
- 2** Pressure vs. Potential
- 3** Pillar 1: Cross-Functional Alignment
- 4** Pillar 2: Integrated Planning
- 5** Pillar 3: Performance Measurement
- 6** Roadmap



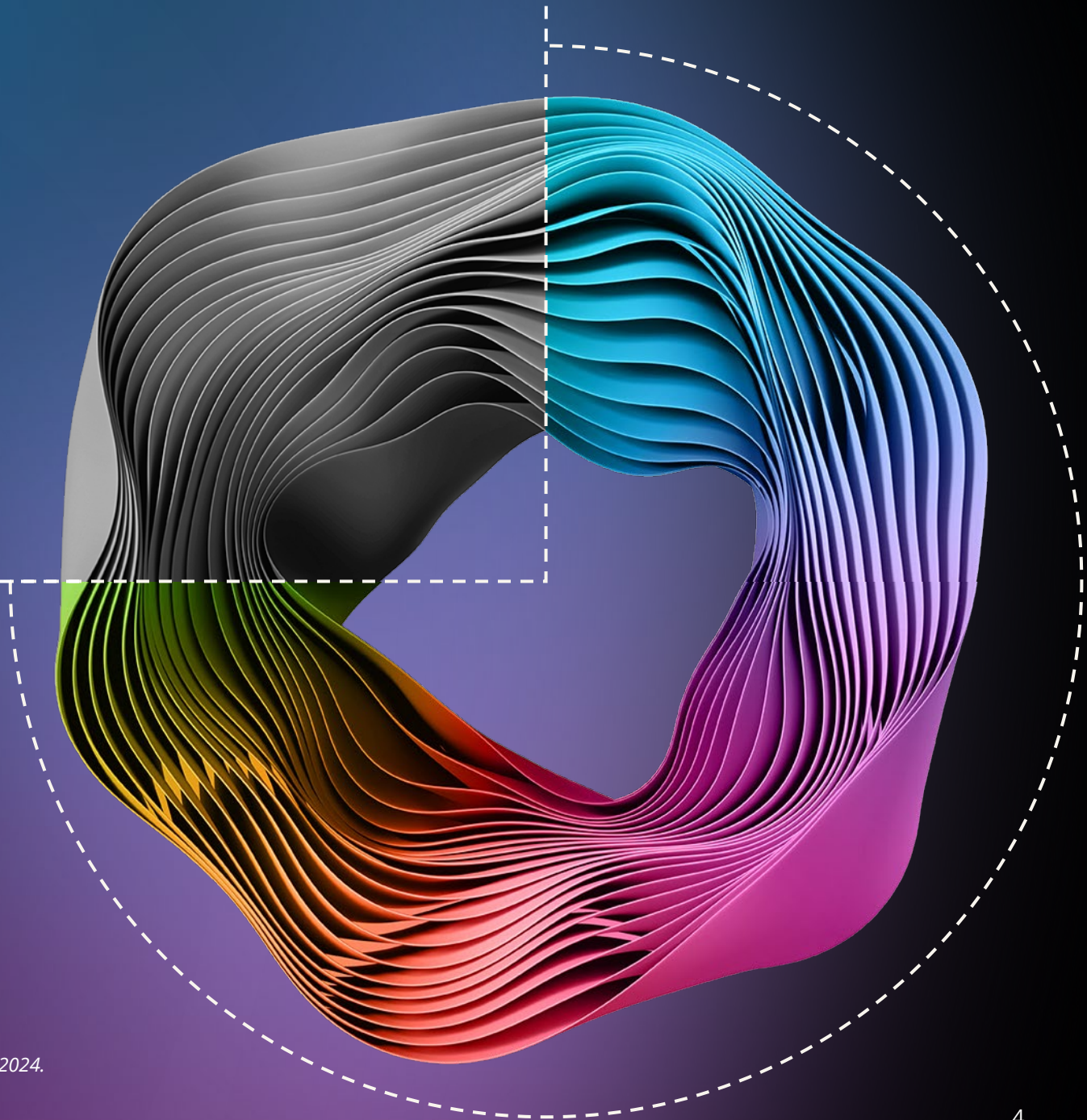


Joanna Buchholz

Deloitte Consulting LLP Managing Director

Everyone feels the **constant pressure**
to show the value of marketing.

75% of CMOs feel
intensified ROI
pressure from CFOs



Sources: The CMO Survey, "Marketers Claim a Broader Role and Increased Influence Amid Pressures," 2024.
Deloitte Digital. "Marketing Investment Trends 2025." May 2025.

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SHOW OF HANDS

How many of you report up
through your CFO or CEO?



PRESSURE

versus

POTENTIAL

Quantifying the problem and
spotlighting the opportunity
cost of misalignment

According to research, firms with tight
CMO-CFO alignment see up to **25%**
higher marketing ROI

THOUGHT EXERCISE

What one word describes
your biggest marketing ROI
challenge?

PILLAR 1: CROSS-FUNCTIONAL ALIGNMENT

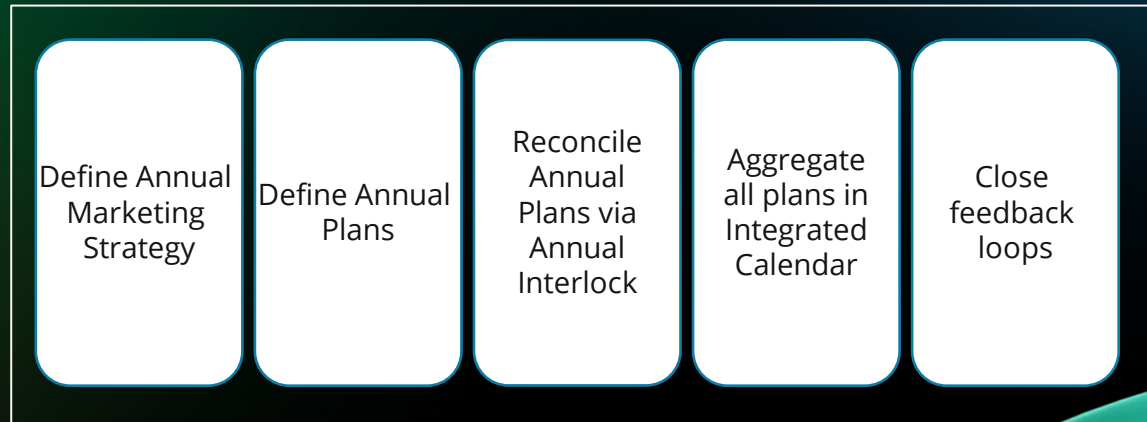
Building a **shared language** and
rhythms between ***Marketing,***
Finance, and Exec Leadership.

Sample Integrated Annual Planning & Orchestration

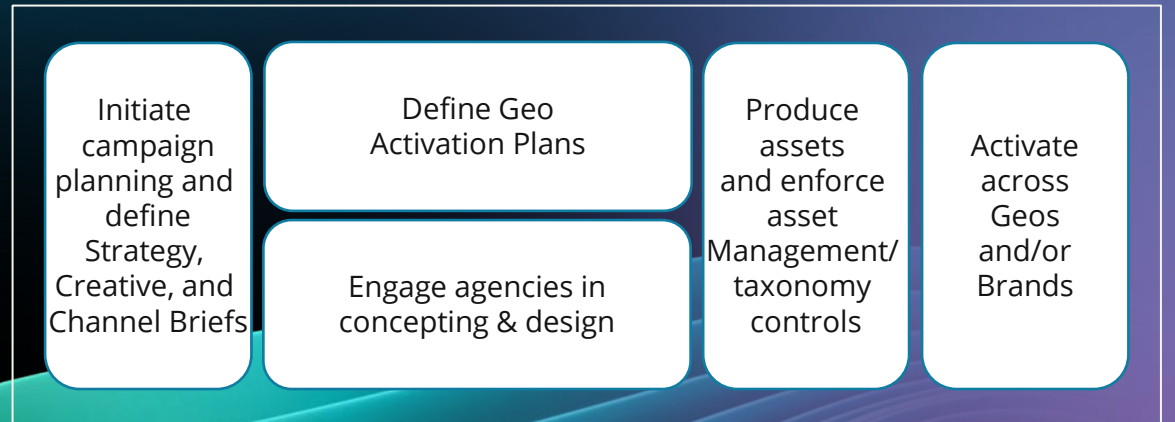
Business Process Model



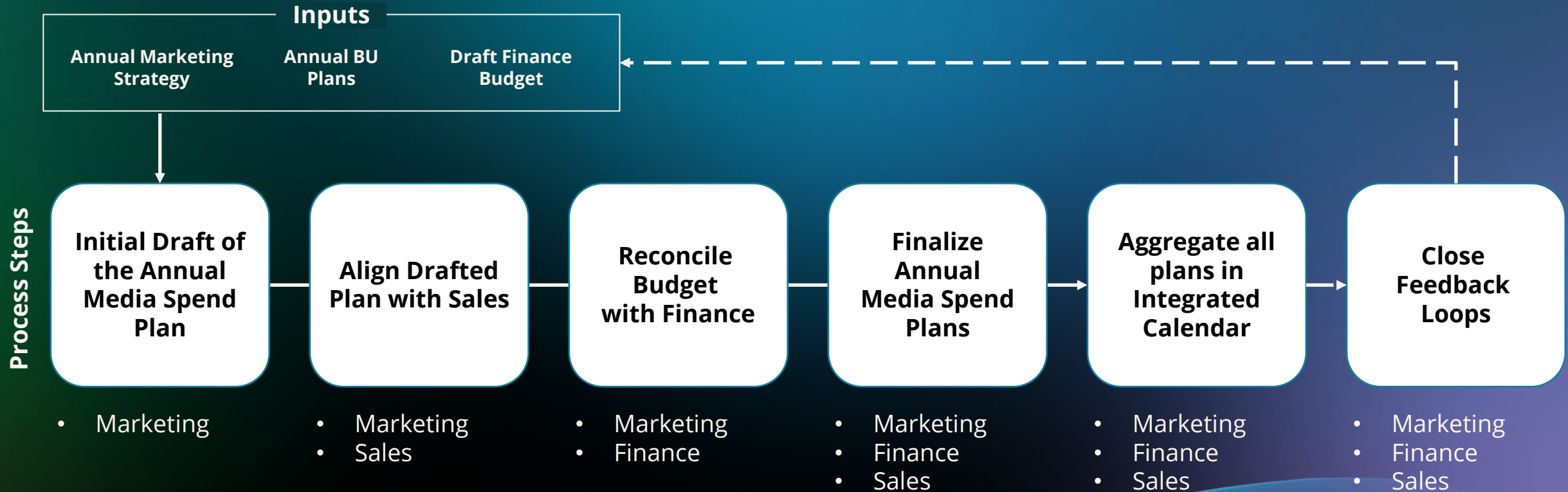
1 Integrated Annual Planning & Orchestration



2 Enhanced Campaign Briefing & Planning



Sample High-Level Integrated Annual Planning & Orchestration Process



Sample Meetings

	Meeting	Decision / Outcome	Timing		
			Q2	Q3	Q4
Annual Planning	Finance Budget Discussions	✓ Finalized Marketing Budget	★	★	
	Annual Media Spend Plan Interlock Meetings	✓ Approved Annual Media Spend Plans		★ Media Spend + Audience Champ	★ Media Spend + Geos ★ Media Spend + BU Sales ★ Leadership ★ CMO
Feedback Loops / Adapted QBR	Campaign Performance Reviews	✓ Adjustments to campaigns to increase effectiveness		★	★
	BU Performance Reports	✓ Approvals for new BU budget or major strategic shifts		★	★
	Geo Pulse Checks	Course correction based on market / competitive shifts	★	★	★
	Marketing Council Meetings	✓ Resolve time-sensitive activation issues	★ ★ ★ ★ ★ ★ ★ ★	★ ★ ★ ★ ★ ★ ★ ★	★ ★ ★ ★ ★ ★ ★ ★

MINI ROLE PLAY

Requesting incremental \$1 M for a new brand campaign

Craft a 2-sentence business case that links the creative concept to expected financial growth

PILLAR 2: INTEGRATED PLANNING

Moving from isolated annual plans to an ***agile, end-to-end planning engine.***

Marketing Planning capabilities are truly cross functional to address the pain points across a business – not just Marketing

PLANNING & BUDGETING

- Strategy & Pre-Approval of Marketing Plans
- Integrated Budgeting & Forecasting
- Real-time Visibility & Reallocations




ACTIVATION & EXECUTION

- Pre-Approval of Campaign & Activity Plans
- Real-Time Sharing of Activity Plans
- PR and PO Matching to Enable Automated Accruals

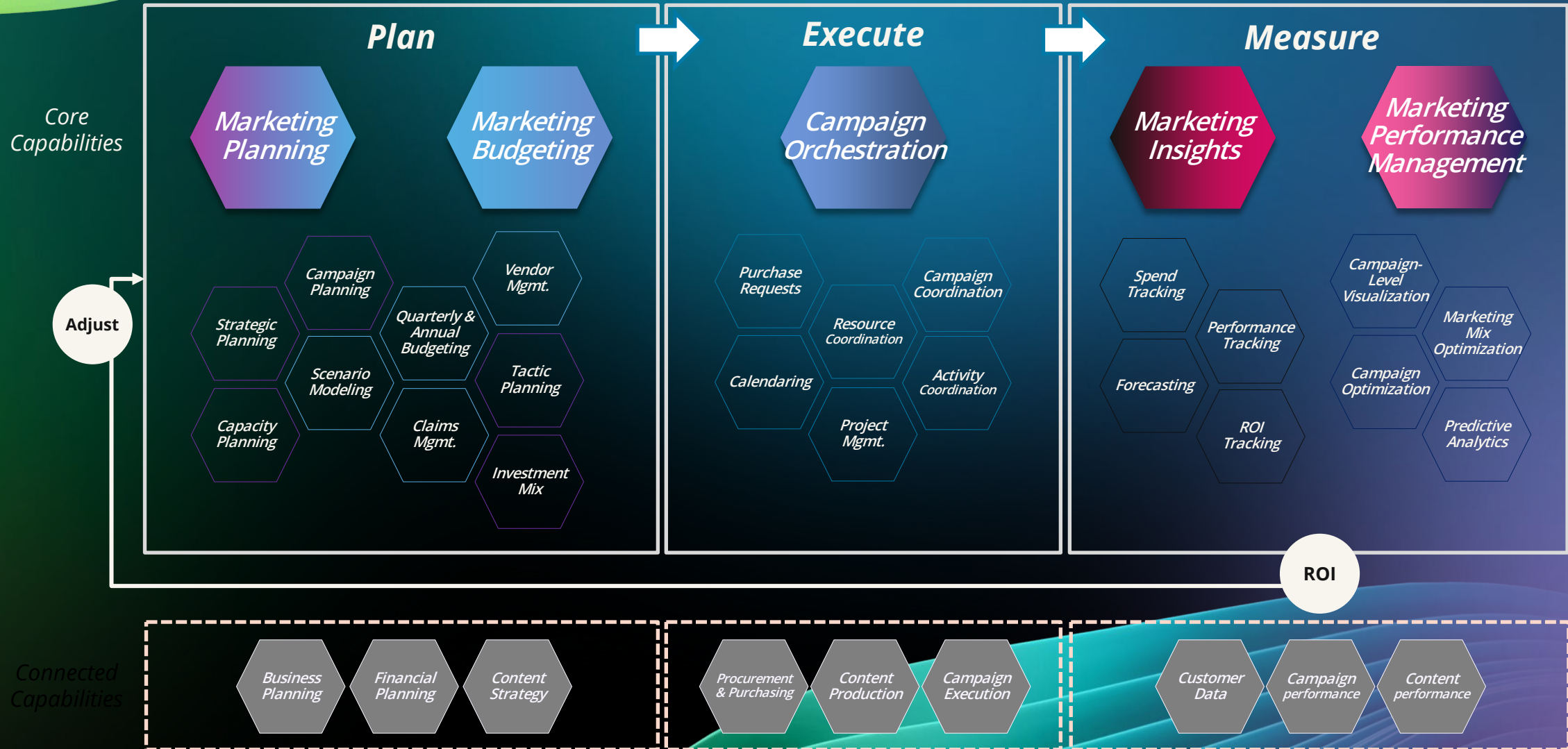
MEASUREMENT & EFFECTIVENESS

- Performance Measurement
- Spend Efficiency Tracking
- Campaign-Level Visualization

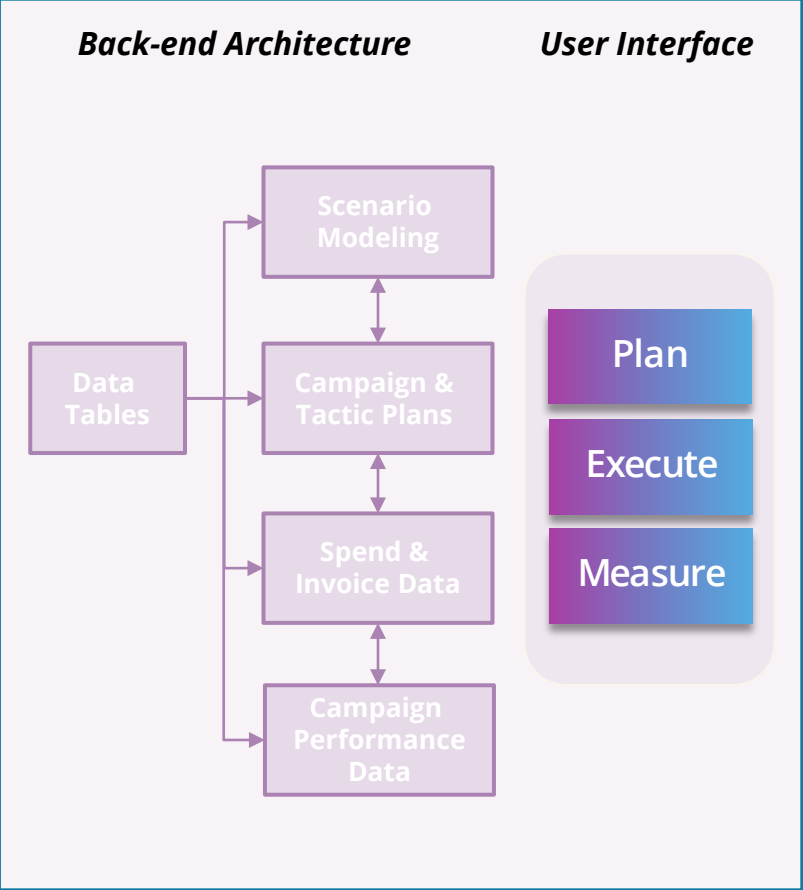
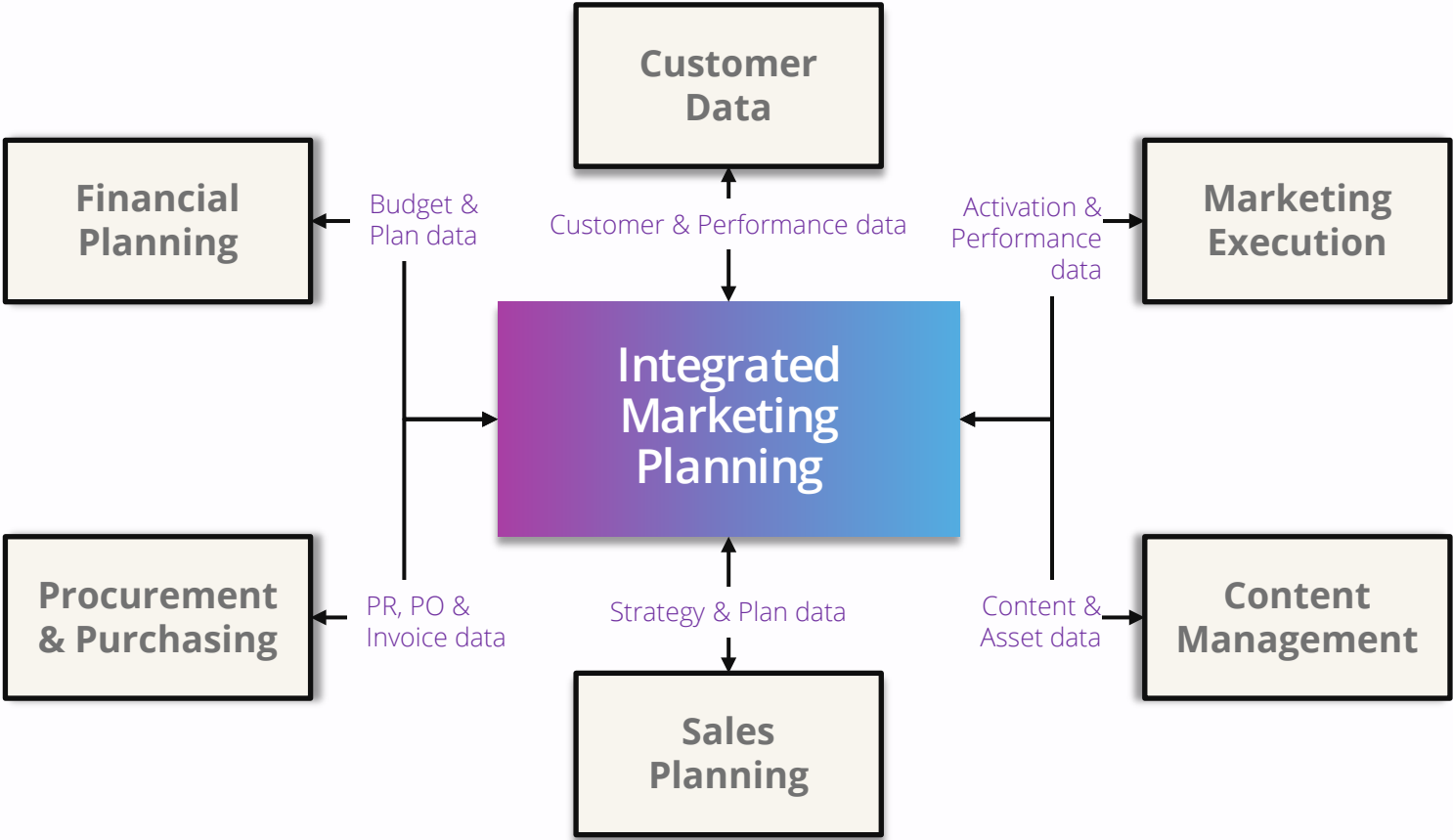
Getting this integration right benefits multiple stakeholders

	Effectiveness	Efficiency	Agility
Marketing Leader 	Influence boardroom decisions with marketing performance aligned to business KPIs	Optimize marketing resources and spend to meet 'achieve more with less' demands	Quickly analyze performance and re-allocate resources and budget
Marketer 	Consistently align tactical efforts with customer journey and business KPIs	Minimize time spent on operations to focus more on actual marketing	Accelerate the time from planning to execution, bringing campaigns to market faster
Marketing Operations 	Align resources and investments to the most effective campaigns	Implement streamlined planning cycles with automated spend tracking	Increase global and regional campaign visibility to enable quick, mid-cycle pivots
Finance 	Enhance spend transparency for effective marketing budget management	Automate spend controls and reporting with integration to procurement and actuals	Leverage real-time insights to quickly re-allocate budget based on financial shifts
MarTech / IT 	Centralize data to enable comprehensive analysis and effective decision-making	Consolidate disparate systems and connect data to simplify MarTech and automate insights	Maintain one source of truth for all marketing insights, from plan through execution

What does Integrated Planning include?



Conceptual Integrated Marketing Planning Ecosystem



POLL

Which planning pain point resonates the most with you? Think about one action you can take to fix your selected pain point.

1

Budget
Cycles

2

Creative
Approvals

3

Data
Silos

4

KPI
Mismatch

PILLAR 3: PERFORMANCE MEASUREMENT

Defining success through
balanced scorecards and iterative
learning loops.

All marketing activities should tie back to the Measurement Framework and aligned objectives

SAMPLE MEASUREMENT FRAMEWORK

Objective	ENGAGE CUSTOMERS THROUGH A MULTILAYER CALENDAR		PROMOTE PROFITABLE GROWTH	INCREASE CUSTOMER FREQUENCY	GROW AN ACTIVE LOYALTY BASE
Customer Journey Stage	CUSTOMER JOURNEY*				
	Search	Enter	Build Cart	Checkout & Receive	Beyond
	Drive awareness among Client's target audience to promote effective acquisition	Increase consideration and decisioning among new and returning Client customers	Encourage check-building from known and new Client customers	Drive commitment through encouraging customers to create an account	Drive loyalty and nurture relationship with current Client customers through personalized messages in the app / web
Foundational Levers	PERSONALIZATION, OPTIMIZATION, AND TARGETING		SALES LEVERS	LOYALTY LEVERS	MARKETING OPS EFFICIENCY
Operational Metrics	<ul style="list-style-type: none"> Reduce Time to Purchase Coupon / Rewards Redemption Engagement Score 	<ul style="list-style-type: none"> Repeat Customers Renewal / Churn Purchase Frequency Traffic to Site 	<ul style="list-style-type: none"> Net Revenue Retention / Customer Retention Cost Customer Acquisition Cost Potential Customers Generated 	<ul style="list-style-type: none"> Product Awareness Purchase Intent Score Average Purchase Value 	<ul style="list-style-type: none"> Average Order Value Transactions / Incremental Transactions Upsells / Cross-sells / Expansion Revenue SSSG / PPNO
Diagnostic Metrics	Email		App Push		In-App / Content Card
	<ul style="list-style-type: none"> Click Through Rate Unsubscribe Rate Click-to-Open Rate 	<ul style="list-style-type: none"> Opt-in / Opt-out Rate Delivery Rate Bounce Rate 	<ul style="list-style-type: none"> Delivery Rate Open Rate Unsubscribe Rate Click Through Rate 	<ul style="list-style-type: none"> App Engagement Rate App Open Rate Abandon Cart Rate 	

DEFINITIONS OF MEASUREMENT

→ **Objectives and Key Results (OKRs)** are the north star driving all other key decisions within the framework

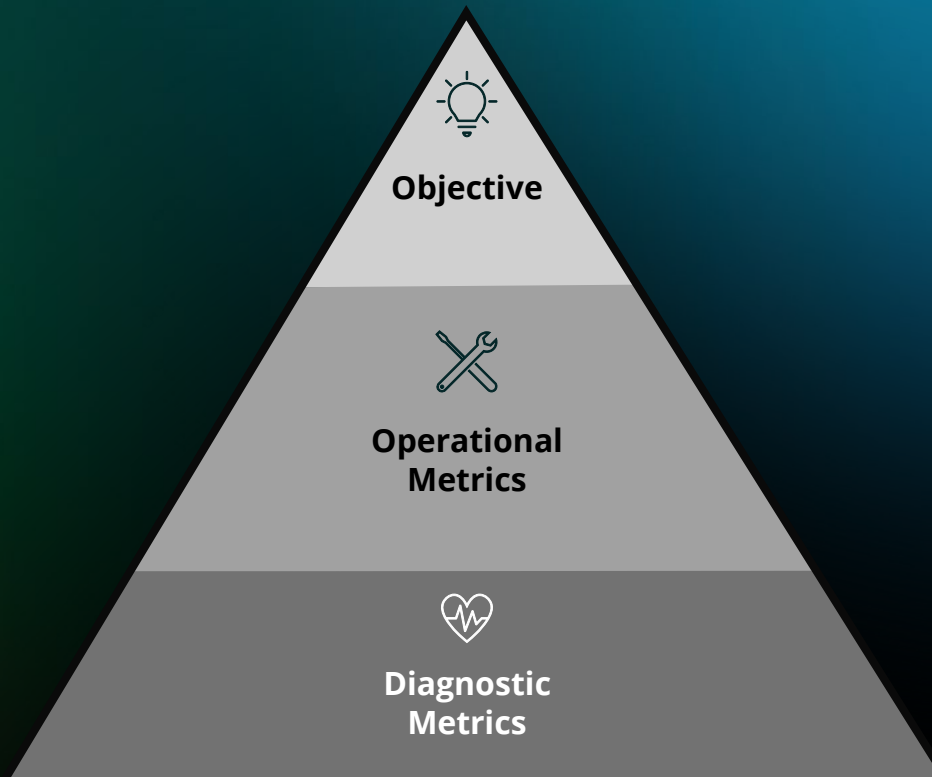
→ **The Customer Journey** ensures activations meet customers at the right place, at the right time, with the right message

→ **Foundational Levers** are areas for optimization focus through activations

→ **Operational & Diagnostic KPIs** measure success of activations in market to garner learnings for Foundational Levers

The Measurement Framework

MEASUREMENT FRAMEWORK



OVERVIEW

***What** is achieved at a program-level*

Objective: Metrics used at a higher level to measure the overall success of marketing

***How** it is achieved across value driver*

Operational Metrics: Metrics used in the day-to-day management of operational effectiveness

***Why** is the achievement changing by channel*

Diagnostic Metrics: Metrics that help determine the performance of specific channels used for campaigns

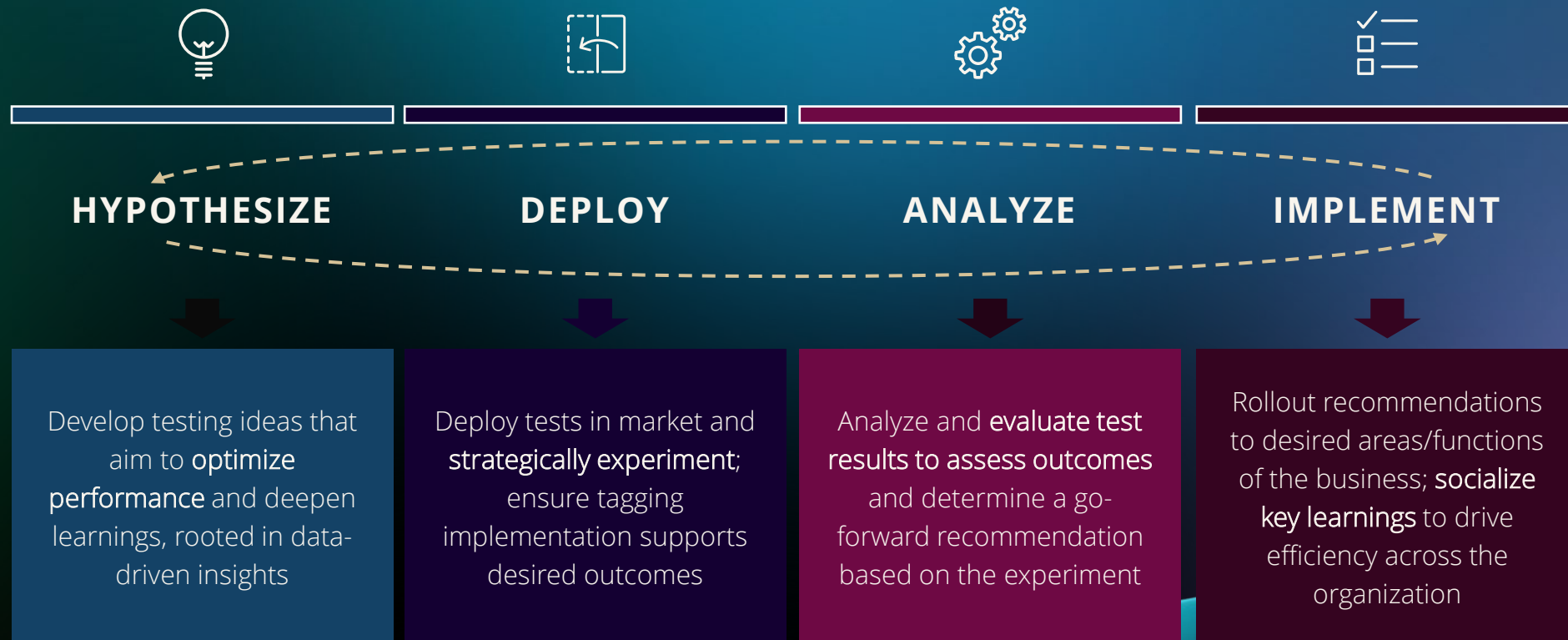
Multi-Touch Attribution vs. Marketing Mix Modeling (MMM)

Multi-Touch Attribution

Marketing Mix Modeling

Description	Assigns credit for each transaction based on what ads were seen and when, best suited for digital marketing environments where user-level data is available.	A statistical model that assigns total sales attribution based on channel level spend, taking a broader, top-down approach by analyzing historical data across both offline and online marketing channels (e.g., TV, radio, print, digital).
Not cookie dependent		✓
Omnichannel		✓
Tactical optimizations	✓	
Budget optimizations		✓
Consistent data for modeling	✓	✓
Refreshes	Daily/Weekly	Annual
When to use	Use when you need granular insights into how specific digital channels and campaigns influence conversions, especially in environments with robust and trackable data.	Use to understand the overall impact of marketing investments on sales or other key outcomes, especially when user-level data is limited or unavailable. MMM also helps with holistic marketing measurement, for long-term planning, budget allocation, and measuring the effectiveness of traditional media alongside digital efforts.
Dependencies	Requires user-level data and rich, trackable datasets.	

Sample Test & Learn Framework



A comprehensive MMM dashboard should provide clarity, track performance, and offer actionable recommendations



Visualization

Data Clarity and Visualization

Dashboards must present MMM results using clear, interactive charts and tables. This enables users to easily interpret performance across channels and spot actionable insights quickly.



Tracking

Performance Tracking

Track KPIs such as ROI, ROAS, and attribution by campaign, channel, and time-period. Real-time updates and historical comparisons help teams identify trends and optimize future investments.



Forecasting

Forecasting & Planning

Recommendation tools and scenario planning enable better decisions and continuous improvement across marketing investments and channels for clients and stakeholders.



Recommendations

Actionable Recommendations

Dashboards should highlight optimization opportunities, budget reallocation suggestions, and scenario planning tools. This supports decision makers with evidence-based recommendations for next steps.

A best-in-class dashboard empowers stakeholders with clear, actionable insights by transforming complex reporting outcomes into intuitive visualizations that drive faster, smarter decision-making.

DATA IS FOR ILLUSTRATIVE PURPOSES ONLY

Deloitte Customer KPI Dashboard
Digital

SUMMARY

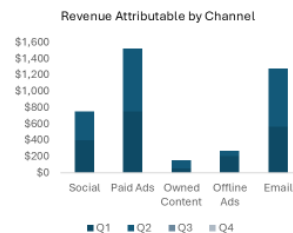
7.9%_{ROMI}

\$2,001 M
Revenue

8.9% | \$178 M
% Revenue Spent on
Marketing Expenses

26.7 M
Leads Cor

\$75.00
Average Lead Value



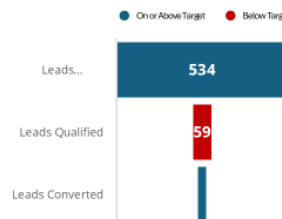
Marketing Funnel

26.7 M
Leads Converted

11%
Leads Generated
to Qualified

Leads Qualified to
Converted

5%
Overall
Conversion Rate

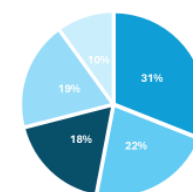


Competitive Positioning

31%

33%	28%
Target	PY

28%
PY

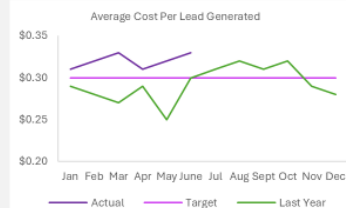


■ Client ■ Comp. 1 ■ Comp. 2 ■ Comp. 3 ■ Comp. 4

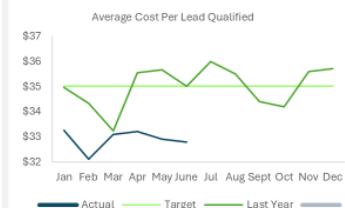
JOURNEYS

Brand A

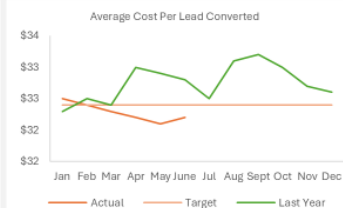
Awareness



Consideration



Buy



Experience



Loyalty



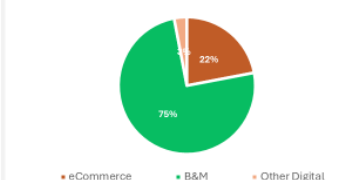
ROAS vs. CPM



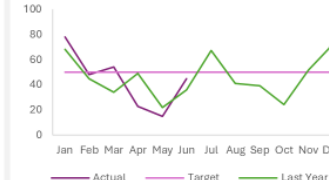
Number of Email Signups



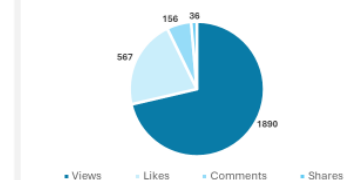
Current Quarter Sales Breakdown



% of Repeat Purchasers



Avg. Daily Loyalty Social Media Traffic



Integrated Marketing Planning Maturity Model

 **Crawl**

 **Walk**

 **Run**

 **Fly**

Plan	Manual, offline planning with limited visibility, non-standard KPIs, and no consistent tracking or strategic guardrails.	Integrated strategic planning, standardized KPIs, and unified budgeting for visibility and alignment across marketing, finance & sales.	Aligned cross-functional planning, agile approvals, and automated budget controls streamline operations.	AI-powered planning and budget compliance, with an integrated tool and standardized KPIs, unify marketing, finance & sales.
Execute	Inconsistent campaign tracking and limited collaboration tools hinder cross-team alignment.	Standardized campaign taxonomy and established collaboration tools enable effective cross-team alignment.	Optimized creative briefs and automated collaboration tools drive efficient, data-informed teamwork across teams.	AI-generated creative briefs with activity, asset and channel recommendations aligned to strategic initiatives.
Measure	Fragmented data, manual reporting, and low trust in ROI attribution undermine decision-making confidence.	Integrated reporting and real-time budget visibility provide reliable campaign insights for informed decision-making.	Unified measurement and AI-driven reporting, integrated with campaign execution, enable strategic investments and predictive insights into outcomes.	Automated monitoring and AI-driven insights deliver asset-level accountability and investment recommendations by campaign, channel, and audience.

Knocking down common transformation blockers



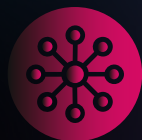
**Diverse
Stakeholders**



**Functional
Silos**



**Misaligned
Taxonomies**



**Complex
Ecosystems**



**Data
Granularity**



**Marketer
Mindset**

PERSONAL COMMITMENT

Write down one action that you
will take next Monday.

RECAP

1

Cross-Functional
Alignment

2

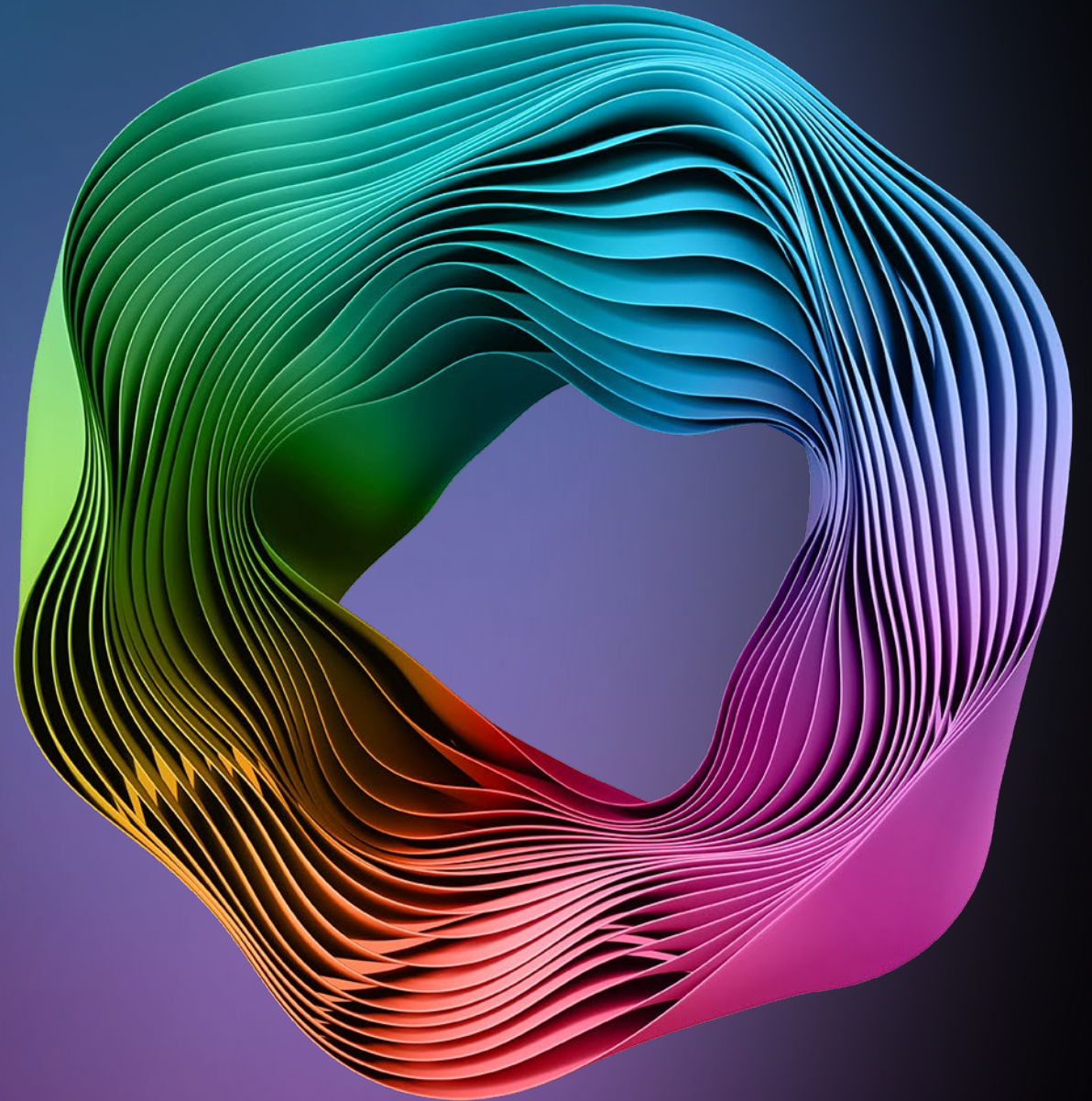
Integrated
Planning

3

Performance
Measurement

Thank You

Contact Info: jbuchholz@deloitte.com



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