

Globalized Marketing Operations: the Central Piece of Your Marketing Transformation

December 2023: Complimentary Abstract / Table of Contents



Our research offerings

This report is included in the following research program(s):

[Marketing Services, GBS Talent Excellence](#)

- ▶ Amazon Web Services (AWS)
- ▶ Application Services
- ▶ Artificial Intelligence (AI)
- ▶ Asset and Wealth Management
- ▶ Banking and Financial Services Business Process
- ▶ Banking and Financial Services Information Technology
- ▶ Catalyst™
- ▶ Clinical Development Technology
- ▶ Cloud and Infrastructure
- ▶ Contingent Staffing
- ▶ Contingent Workforce Management
- ▶ Customer Experience Management Services
- ▶ CX Excellence
- ▶ CXM Technology
- ▶ Cybersecurity
- ▶ Data and Analytics
- ▶ Digital Adoption Platforms
- ▶ Digital Services
- ▶ Digital Workplace
- ▶ Employee Experience Management (EXM) Platforms
- ▶ Employer of Record (EOR)
- ▶ Engineering Research and Development
- ▶ Enterprise Platform Services
- ▶ Exponential Technologies
- ▶ Finance and Accounting
- ▶ Financial Services Technology (FinTech)
- ▶ GBS Talent Excellence
- ▶ Global Business Services
- ▶ Google Cloud
- ▶ HealthTech
- ▶ Human Resources
- ▶ Insurance Business Process
- ▶ Insurance Information Technology
- ▶ Insurance Technology (InsurTech)
- ▶ Insurance Third-Party Administration (TPA) Services
- ▶ Intelligent Document Processing
- ▶ Interactive Experience (IX) Services
- ▶ IT Services Excellence
- ▶ IT Talent Excellence
- ▶ Life Sciences Business Process
- ▶ Life Sciences Commercial Technologies
- ▶ Life Sciences Information Technology
- ▶ Locations Insider™
- ▶ Marketing Services
- ▶ Market Vista™
- ▶ Microsoft Azure
- ▶ Microsoft Business Application Services
- ▶ Modern Application Development (MAD)
- ▶ Mortgage Operations
- ▶ Multi-country Payroll
- ▶ Network Services and 5G
- ▶ Oracle Services
- ▶ Outsourcing Excellence
- ▶ Payer and Provider Business Process
- ▶ Payer and Provider Information Technology
- ▶ Pricing Analytics as a Service
- ▶ Process Intelligence
- ▶ Process Orchestration
- ▶ Procurement and Supply Chain
- ▶ Recruitment
- ▶ Retail and CPG Information Technology
- ▶ Retirement Technologies
- ▶ Revenue Cycle Management
- ▶ Rewards and Recognition
- ▶ SAP Services
- ▶ Service Optimization Technologies
- ▶ Software Product Engineering Services
- ▶ Supply Chain Management (SCM) Services
- ▶ Sustainability Technology and Services
- ▶ Talent Genius™
- ▶ Technology Skills and Talent
- ▶ Trust and Safety
- ▶ Value and Quality Assurance (VQA)

If you want to learn whether your organization has a membership agreement or request information on pricing and membership options, please contact us at info@everestgrp.com

[Learn more about our custom research capabilities](#)

Benchmarking

Contract assessment

Peer analysis

Market intelligence

Tracking: providers, locations, risk, technologies

Locations: costs, skills, sustainability, portfolios

Contents

1. Introduction and overview	5
• Research methodology	6
• Sources of information	7
• Background and scope of research	8
• Marketing services value chain	9
• Executive summary	10
2. Marketing operating model	11
• Factors that will drive the transformation of the marketing operating model	13
• Structure of marketing operating model	14
3. Delivery model	15
• Factors behind lower adoption of offshore marketing delivery	16
• Hub & spoke delivery model	17
4. Sourcing model	18
• Elements of a sourcing model	19
• Enterprise outsourcing priorities and provider initiatives	20
• Adoption of offshoring by process by buyer size and industry	21
• In-house sourcing landscape (Role of GBS)	24
– GBS delivery by industry and process	25
• Finding the right balance in your sourcing mix	28

For more information on this and other research published by Everest Group, please contact us:

Rajesh Ranjan, Partner

Bharat M, Vice President

Nishant Jeyanth, Practice Director

Darshita Lohiya, Senior Analyst

Ishita Parekh, Senior Analyst

Mudra Jain, Analyst

Contents

• Global marketing delivery locations landscape	29
– Geography in focus: India	30
– Geography in focus: the Philippines	31
– Geography in focus: CEE	32
• Location optimization overview	33
• Talent sourcing framework	34
5. Enabling pillars	35
• Governance model for marketing operations	37
• Integrated technology stack	38
• Risk mitigation	39
• Operating philosophy	40
6. Fast forward: generative AI and your delivery model	41
• Impact of gen AI on marketing processes	42
• Impact of gen AI on marketing work distribution	43
• Enterprise considerations for adoption of gen AI	44
7. Appendix	45
• Glossary	46
• Research calendar	47

Background and scope of the research

The operating model for marketing teams has evolved rapidly in recent years. Marketing's traditional offline and localized model has been disrupted by the rise of the internet and consequent globalization, making marketing a significant part of the enterprises' global delivery strategy. Furthermore, recent global phenomena such as the COVID-19 pandemic, the subsequent recession, changing consumer behavior, and the growth of generative AI (gen AI) have compelled marketers to rethink their marketing strategies and deliver more with less.

As marketers focus on reshaping their delivery strategies, the prime focus remains on “where, who, and how.” The answer to these three questions forms the bedrock of a robust marketing operating model that will drive relevant, personalized, automated, and cost-efficient marketing campaigns for the consumer of today.

In this report, we define the multiple layers of the marketing operating model and discuss the importance of a robust delivery and sourcing model that forms the core of marketing operations. We further analyze the marketing offshoring/nearshoring landscape and the key benefits of marketing services delivery from low-cost, talent-rich regions. We provide a detailed overview of the in-house and outsourced sourcing strategies, along with the underlying factors that will make or break the overall marketing operating model.

We focus on:

- The key factors that will lead to the transformation of marketing operations as we know it
- The fundamental elements of the marketing operating model – delivery, sourcing and talent, and enabling pillars (integrate technology, risk mitigations, governance, and operating philosophy)
- How to evaluate the impact of gen AI on marketing delivery

Scope of this report



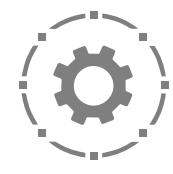
Geography
Global



Service providers
35+ marketing
service providers



Services
250+ enterprises



Use cases
Marketing services

Overview and abbreviated summary of key messages

This report examines the global 2023 marketing services landscape. It focuses on the various elements of marketing delivery and sourcing landscape that collectively form the global marketing operating model. It provides key insights for enterprise sourcing strategies and highlights the benefits of offshoring/nearshoring marketing activities to low-cost delivery centers. It further defines the enabling ecosystem for the marketing operating model and highlights the impact of generative AI on enterprise marketing strategies.

Some of the findings in this report, among others, are:

Marketing's operating model is primed for disruption

- A growing need for talent, coupled with macroeconomic factors, have led to the rapid evolution of the marketing services operating model
- The evolution is set to happen rapidly, with the tried-and-true hub & spoke model forming the basis of future evolution

Evolution sparks transformation in sourcing priorities

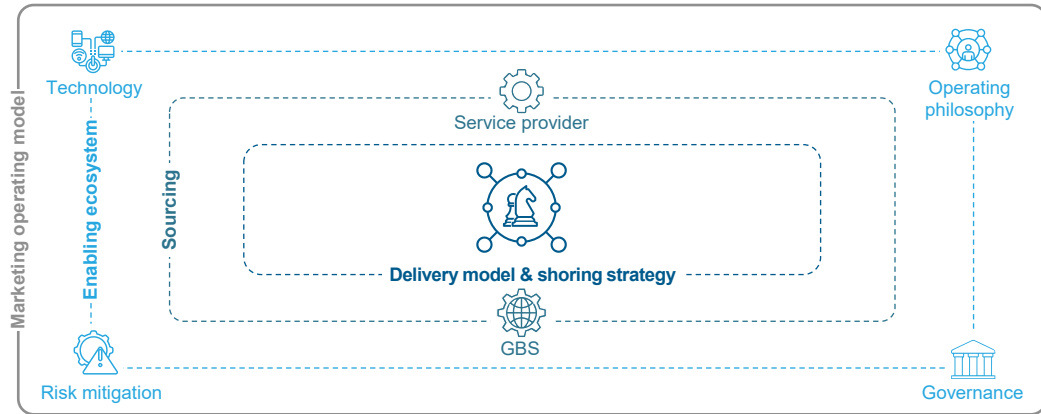
- The result of enterprise customers' plethora of demands is service providers rapidly globalizing delivery and deepening expertise to become the partner of choice
- Content and campaign processes adoption is strong across enterprises and sourcing choices

Enabling pillars take shape to accelerate growth

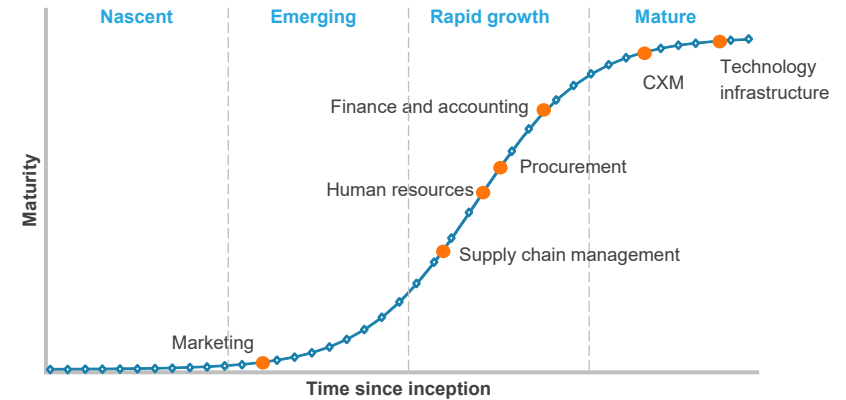
- Technology platforms have become critical in enabling a global operating model; many technology providers already have suitable offerings in the market
- Firms will need to choose appropriate governance models, build rich enterprise cultures, and assess multiple risk factors when designing their operating models

This study offers seven distinct chapters providing a deep dive into key aspects of marketing operating model; below are four charts to illustrate the depth of the report

Marketing's operating model



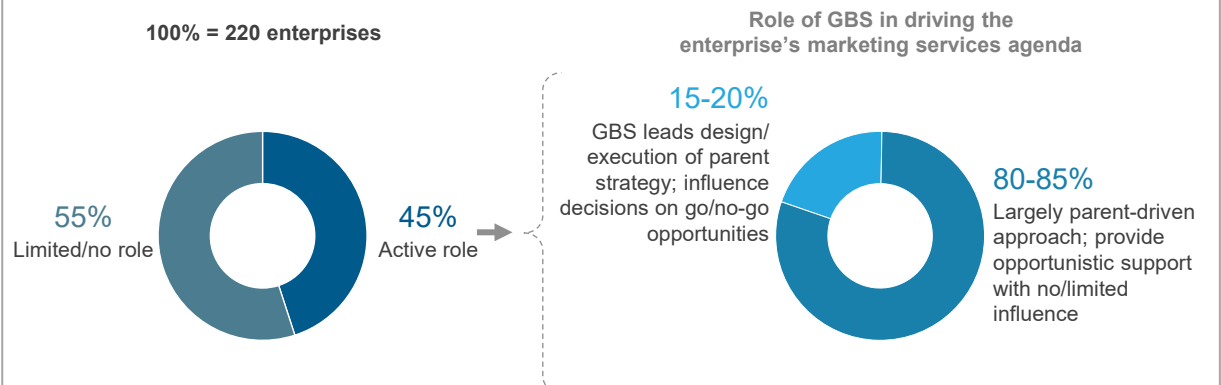
Maturity nearshoring/offshoring across corporate functions



Offshored marketing services contracts by process



Distribution of GBS centers by level of participation in marketing services delivery



Research calendar

GBS/SS Talent Excellence

Published Current release

Reports title	Release date
Future of Work: Shift to Hybrid Delivery Models	January 2023
Webinar Deck: Sustainability in the New Year: Follow Through on Resolutions for People and the Planet	February 2023
Talent Demand Trends India IT Services – H2 2022	May 2023
Top GBS Employers™ in India, the Philippines, and Poland – 2023	July 2023
Top Employers for Tech Talent™ in India, the US, and the UK – 2023	July 2023
How GBS Organizations Build Differentiated Employer Brand Perception	August 2023
Generative AI: The Disruption the GBS Model Needs, or Just Another Over-hyped Technology?	August 2023
Virtual Roundtable Discussion Deck: The State of Insurance GBS: Igniting Innovation, Expanding Scope, and Driving Talent Strategy	August 2023
Talent Demand Trends India IT Services – H1 2023	August 2023
Roundtable Discussion Deck: India GCCs Propelling the Next Wave of Growth for Life Sciences Organizations	September 2023
Virtual Roundtable Discussion Deck: Positioning GCCs for Success: Drive Superior Value and Advance Business Impact	October 2023
Webinar Deck: The State of the GBS Market: Opportunities and Success Strategies for GBS Leaders	November 2023
Impact Sourcing for Sustainable Development and a Brighter Future: Impact Sourcing State of the Market 2023	December 2023
Webinar Deck: Key Issues for 2024: Creating Accelerated Value in a Dynamic World	December 2023
Global Marketing Operations: the Central Piece of Your Marketing Transformation	December 2023

Note: [Click](#) to see a list of all of our published GBS/SS Talent Excellence reports

Research calendar

Marketing Services

■ Published
 ■ Planned
 ■ Current release

Reports title	Release date
BPS Top 50 – 2022	June 2022
A New Paradigm of Marketing Beckons: Marketing Services State of the Market Report 2022	November 2022
Dawn of the Planet of the Bots: Intelligent Automation and Marketing Services	December 2022
Marketing in a Permacrisis: a CMO Survival Toolkit	January 2023
Marketing Services PEAK Matrix® Assessment 2023	February 2023
The X, Y, Z of Marketing	March 2023
Marketing Services – Provider Compendium 2023	April 2023
Generative AI: The New Age of Artificial Intelligence	May 2023
Safeguarding Brand Reputation in the Modern Era	September 2023
The Yin and Yang of Today's Marketing: Marketing Services State of the Market 2023	October 2023
Marketing's Generative AI-ffair: Infusing Generative AI's Magic into Enterprise Marketing Functions	December 2023
Global Marketing Operations: the Central Piece of Your Marketing Transformation	December 2023
Loyalty Services: an Imperative for Exponential Growth	Q1 2024
Marketing Services PEAK Matrix® Assessment 2024	Q1 2024
The Goliaths of Advertising	Q2 2024

Note: [Click](#) to see a list of all of our published Marketing Services reports



Everest Group is a leading research firm helping business leaders make confident decisions. We guide clients through today's market challenges and strengthen their strategies by applying contextualized problem-solving to their unique situations. This drives maximized operational and financial performance and transformative experiences. Our deep expertise and tenacious research focused on technology, business processes, and engineering through the lenses of talent, sustainability, and sourcing delivers precise and action-oriented guidance. Find further details and in-depth content at www.everestgrp.com.

Stay connected

Dallas (Headquarters)
info@everestgrp.com
+1-214-451-3000

Bangalore
india@everestgrp.com
+91-80-61463500

Delhi
india@everestgrp.com
+91-124-496-1000

London
unitedkingdom@everestgrp.com
+44-207-129-1318

Toronto
canada@everestgrp.com
+1-214-451-3000

Website
everestgrp.com

Social Media
 @EverestGroup
 @Everest Group
 @Everest Group
 @Everest Group

Blog
everestgrp.com/blog

NOTICE AND DISCLAIMERS

IMPORTANT INFORMATION. PLEASE REVIEW THIS NOTICE CAREFULLY AND IN ITS ENTIRETY. THROUGH YOUR ACCESS, YOU AGREE TO EVEREST GROUP'S TERMS OF USE.

Everest Group's Terms of Use, available at www.everestgrp.com/terms-of-use/, is hereby incorporated by reference as if fully reproduced herein. Parts of these terms are pasted below for convenience; please refer to the link above for the full version of the Terms of Use.

Everest Group is not registered as an investment adviser or research analyst with the U.S. Securities and Exchange Commission, the Financial Industry Regulatory Authority (FINRA), or any state or foreign securities regulatory authority. For the avoidance of doubt, Everest Group is not providing any advice concerning securities as defined by the law or any regulatory entity or an analysis of equity securities as defined by the law or any regulatory entity.

All Everest Group Products and/or Services are for informational purposes only and are provided "as is" without any warranty of any kind. You understand and expressly agree that you assume the entire risk as to your use and any reliance upon any Product or Service. Everest Group is not a legal, tax, financial, or investment advisor, and nothing provided by Everest Group is legal, tax, financial, or investment advice. Nothing Everest Group provides is an offer to sell or a solicitation of an offer to purchase any securities or instruments from any entity. Nothing from Everest Group may be used or relied upon in evaluating the merits of any investment. Do not base any investment decisions, in whole or part, on anything provided by Everest Group.

Products and/or Services represent research opinions or viewpoints, not representations or statements of fact. Accessing, using, or receiving a grant of access to an Everest Group Product and/or Service does not constitute any recommendation by Everest Group that recipient (1) take any action or refrain from taking any action or (2) enter into a particular transaction. Nothing from Everest Group will be relied upon or interpreted as a promise or representation as to past, present, or future performance of a business or a market. The information contained in any Everest Group Product and/or Service is as of the date prepared, and Everest Group has no duty or obligation to update or revise the information or documentation. Everest Group may have obtained information that appears in its Products and/or Services from the parties mentioned therein, public sources, or third-party sources, including information related to financials, estimates, and/or forecasts. Everest Group has not audited such information and assumes no responsibility for independently verifying such information as Everest Group has relied on such information being complete and accurate in all respects. Note, companies mentioned in Products and/or Services may be customers of Everest Group or have interacted with Everest Group in some other way, including, without limitation, participating in Everest Group research activities.