



RESOURCES

Structure for Scale

The Marketing Growth Blueprint
for B2B Leaders

People. Programs. Platforms.

Build the marketing function your business actually needs—without guesswork, over-hiring, or underperforming results.

Team Structure Planning Worksheet

Use this worksheet to assess your current marketing team model, identify gaps in strategic coverage or execution depth, and determine which structure best fits your company's growth stage and goals.

STEP 1:

What's Your Current Structure?

Mark the model(s) that most closely resemble your current setup:

- ☐ In-House Team
- ☐ Freelancer/Contractor
- ☐ Traditional Marketing Agency
- ☐ Embedded Strategic Partner
- ☐ Hybrid (please describe):

FUNCTION	IN-HOUSE	EXTERNAL	NOT COVERED
Strategic Marketing Leadership	☐	☐	☐
Demand Generation	☐	☐	☐
Content Creation	☐	☐	☐
Graphic Design/Brand	☐	☐	☐
Marketing Operations	☐	☐	☐
Analytics & Reporting	☐	☐	☐
SEO/Website/Digital	☐	☐	☐
Sales Enablement	☐	☐	☐

STEP 2:

Does Your Current Model Support Growth?

Reflection Questions:

Are you bottlenecked by any one role or vendor?

- ☐ Yes ☐ No
- ☐ If yes, where?

Do you have access to senior-level marketing thinking?

- ☐ Yes ☐ No

Are your execution resources fast and flexible enough to meet your needs?

- ☐ Yes ☐ No

Is there clear ownership of the marketing function?

- ☐ Yes ☐ No

Can you scale your programs without burning out the team?

- ☐ Yes ☐ No

Team Structure Planning Worksheet

STEP 3:

Which Model Best Aligns with Your Goals?

MODEL	FIT FOR YOU?	WHY OR WHY NOT?
In-House	☐ Yes ☐ No	
Freelancer/ Contractor	☐ Yes ☐ No	
Traditional Agency	☐ Yes ☐ No	
Embedded Strategic Partner	☐ Yes ☐ No	
Hybrid	☐ Yes ☐ No	

STEP 4:

Priority Actions

List up to three actions you need to take to improve your team structure:

Optional Next Step:
Use the “People, Programs, and Platforms: Alignment Worksheet” to map coverage depth across your current team.

People, Programs, and Platforms:

Alignment Worksheet

A Leadership Tool for Structural Clarity

Use this worksheet to assess whether your current marketing investments are aligned across the three critical dimensions: **People**, **Programs**, and **Platforms**. Even one misaligned area can drag down performance or create unnecessary spend.

People (Team Structure & Roles)



FUNCTION AREA	DO YOU HAVE INTERNAL COVERAGE?	IS EXTERNAL SUPPORT IN PLACE?	IS THIS A CURRENT GAP?
Strategic Marketing Leadership	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Positioning & Messaging	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Content Creation & Strategy	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Demand Generation/Campaigns	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Marketing Operations/Analytics	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Sales Enablement & Alignment	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Web/SEO/Digital Channels	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No



Look for gaps in leadership, execution, or accountability. If multiple areas rely on one person or one vendor, structural risk may be high.



Programs (Campaigns, Content, Growth Drivers)

PROGRAM TYPE	CURRENTLY ACTIVE?	OWNED BY (TEAM OR PARTNER)	SHOWING ROI?
Lead Generation Campaigns	☐ Yes ☐ No		☐ Yes ☐ No
Thought Leadership/Content	☐ Yes ☐ No		☐ Yes ☐ No
ABM/Personalization Campaigns	☐ Yes ☐ No		☐ Yes ☐ No
PR/Analyst Relations/Media	☐ Yes ☐ No		☐ Yes ☐ No
Events/Field Marketing/Webinars	☐ Yes ☐ No		☐ Yes ☐ No
Customer Marketing/Retention	☐ Yes ☐ No		☐ Yes ☐ No



Programs should map to business goals. If something is active but unclear in ROI, it's worth re-evaluating ownership or integration.

Platforms (Technology & Tools)



TOOL CATEGORY	TOOL(S) IN USE	UNDERUTILIZED?	FULLY INTEGRATED?
CRM (Sales & Relationship Mgmt)		☐ Yes ☐ No	☐ Yes ☐ No
Marketing Automation		☐ Yes ☐ No	☐ Yes ☐ No
Analytics & Reporting		☐ Yes ☐ No	☐ Yes ☐ No
SEO & Web Tools		☐ Yes ☐ No	☐ Yes ☐ No
Project & Workflow Management		☐ Yes ☐ No	☐ Yes ☐ No
Content/Asset Management		☐ Yes ☐ No	☐ Yes ☐ No



High-performing teams often use fewer tools better. Reassess tools that aren't fully adopted or fail to support campaign execution.

Summary Reflection

Where are you strongest?

Where are your biggest alignment gaps?

What needs to change before next quarter?

Who needs to be involved in finding and implementing solutions?

Suggested Next Steps

- Review this worksheet quarterly during planning cycles.
- Define accountability and assignments for each gap identified.
- Prioritize changes that will unlock momentum or reduce risk.

Marketing Structure Scorecard

Use this scorecard to evaluate the effectiveness of your current marketing structure. It's designed to highlight areas that are working well and those that need rethinking.

Instructions: For each category, rate your organization on a scale from 1 (Not in Place) to 5 (Strong and Consistent). Use the Notes column to capture specific issues or strengths. Consider the follow-up questions as you work through each category

CATEGORY	1	2	3	4	5	FOLLOW-UP QUESTIONS
Strategic Clarity						Is marketing tied to your business goals? Do you have a clear roadmap?
Executional Consistency						Are campaigns, content, and messaging aligned and on-brand?
Functional Ownership						Do you have clear roles? Is there confusion or overlap?
Sales/Marketing Alignment						Are sales and marketing coordinated on timing, messaging, and leads?
Program Scalability						Can you easily scale campaigns or enter new channels/markets?
Use of Technology						Are we using your marketing tools effectively? Any gaps or redundancy?
Data & Measurement						Do you have visibility into ROI? Are KPIs clear and trusted?
Team Bandwidth						Are key players stretched too thin? Can we execute at the pace you need?
Strategic Oversight						Do you have a strategic marketing leader or partner guiding your efforts?
Flexibility & Adaptability						Can you adjust quickly to changing market or business priorities?

Score Interpretation

40–50: High-performing structure. Review for refinements, not rebuilds.

30–39: Solid foundation, but there are meaningful gaps to address.

20–29: Functioning, but likely causing inefficiencies or missed opportunities.

Below 20: Structure may be limiting growth—consider rethinking resourcing or strategy.

NOTES