



RESOURCES

Structure for Scale

The 2026 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 2026 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? | |
|--------------------------------|--------------------------------|----|-------------------------------|----|------------------------|----|
| | Yes | No | Yes | No | Yes | No |
| Strategic Marketing Leadership | | | | | | |
| Positioning & Messaging | | | | | | |
| Content Creation & Strategy | | | | | | |
| Demand Generation/Campaigns | | | | | | |
| Marketing Operations/Analytics | | | | | | |
| Sales Enablement & Alignment | | | | | | |
| Web/SEO/Digital Channels | | | | | | |



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? |
| Executorial 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

A large, empty white rectangular area intended for taking notes, framed by a thin black border.