

Building a Global Marketing Operating System

How I turned day-to-day marketing execution into documented, repeatable workflows across demand generation, content, creative, events, product marketing, and regional teams.

The work behind the work

Marketing teams rarely struggle because people do not know how to do their jobs. The friction usually lives between the jobs: unclear ownership, inconsistent approvals, scattered assets, version-control problems, and too much knowledge living in someone's head. This playbook was designed to make that work visible and manageable.

SCOPE

Operating areas	Systems	Team environment
Social media Campaigns & webinars Creative production Collateral Brand governance	HubSpot Monday.com Brandfolder Adobe Illustrator	Global marketing Multiple specialties Regional coordination Cross-functional approvals

ROLE

Global Director of Marketing & Demand Generation
I created and standardized the operating practices used by a global marketing organization, with the goal of improving execution quality, reducing bottlenecks, and making programs easier to deliver consistently.

THE OPERATING CHALLENGE

Scale creates coordination problems before it creates marketing problems.

A global marketing organization can have strong specialists and still lose time in handoffs. Social posts need copy, creative, approvals, campaign context, links, scheduling, and ownership. Collateral needs templates, source files, review versions, final files, metadata, storage, and a reliable way for Sales to find it.

The playbook treated those dependencies as an operating system rather than a collection of individual tasks.

What needed to become consistent

- Ownership: who writes, designs, approves, schedules, publishes, updates, and reviews.
- Handoffs: where work moves from one specialty to another and what must be complete before it moves.
- Standards: repeatable formats for paid social, product briefs, web imagery, motion graphics, and other creative.
- Asset governance: where editable source files and final approved files live, how they are labeled, and how teams find them.
- Regional coordination: a shared structure that supports teams in different markets without creating separate operating models for every region.

My approach

Document the process at the level where someone can actually use it. A useful operating process names the owner, the system of record, the required inputs, the approval point, the final destination, and what happens when the work changes.

What this solved

Before	Operating response
Work depended on tribal knowledge	Documented roles and step-by-step workflows
Approvals could happen in different places	Defined review and approval responsibilities
Creative files and final assets could separate	Source and final files linked through a shared workflow
Teams could recreate the same decisions	Reusable templates, sizing rules, and brand standards

One campaign item, many owners. The workflow made the handoffs explicit.

The social media planner is a good example of the broader operating model. Instead of treating a post as a simple writing task, the process mapped the work across execution, copy, media, campaign context, approvals, creative, scheduling, and publishing.

1

Intake & campaign context

Capture the item, campaign, CTA, destination link, content category, and timing in the shared planner.

2

Copy development

Assign writing responsibility and distinguish the copy itself from copy that must appear inside an image or video.

3

Creative production

Route image and video work to the creative team using defined specifications and brand standards.

4

Approval

Name copy and media approvers so review does not depend on informal messages or memory.

5

Scheduling & execution

Assign the person responsible for scheduling, publishing, and connecting the final post to the larger campaign.

6

Visibility

Keep the work in one shared system so contributors can see status, ownership, and what is blocking release.

Why this matters beyond social media

The same logic applies to demand generation, webinars, events, product launches, nurture programs, and sales enablement. Once the team agrees on the handoffs, marketing can move faster without relying on constant meetings or one person acting as the human routing system.

Process principle

Make status visible. A workflow should answer three questions without a meeting: Who owns this now? What is it waiting on? What has to happen next?

The final PDF was only one part of the deliverable.

Collateral creation included a full lifecycle for editable files, review versions, final files, metadata, storage, and downstream use. The process connected Adobe Illustrator, Brandfolder, and Monday.com so the team could preserve the source asset while keeping the approved version accessible.

Collateral lifecycle

- 1 Build from an approved template**
Create the Illustrator source file using the established collateral format.
- 2 Create the review version**
Export a PDF so stakeholders can review the content and design.
- 3 Store the editable source**
Add the AI file to the designated Illustrator area in Brandfolder.
- 4 Store the distribution file**
Add the PDF to the appropriate collateral area, including translated collateral when applicable.
- 5 Connect the systems**
Add links to both assets in the Monday.com work item.
- 6 Review and revise**
Tag the appropriate reviewers, make edits, replace the review PDF at the original link, and repeat until final.
- 7 Finalize the source**
Upload the final Illustrator file so the editable version matches the approved output.
- 8 Prepare for reuse**
Create the web thumbnail, apply labels and metadata, and add the asset to the Marketing & Sales Tools collection.

The governance layer

The process also required categorization by fields such as program, industry, technology alignment, app/module, solution, and function. That turns a file repository into a usable enablement library instead of a digital storage closet.

STANDARDIZATION WITHOUT BOTTLENECKS

Templates reduced repeat decisions while leaving room for good creative work.

The playbook documented design standards for recurring deliverables, including paid LinkedIn ads, website imagery, product briefs, and motion graphics. Examples included defined dimensions, approximate headline and subhead lengths, minimum font sizes, logo placement, runtime guidance, and brand checks.

Paid social	Repeatable image dimensions and copy-length guidance for common ad formats.
Product briefs	A consistent product-marketing structure with app identity, company branding, supporting content, and a clear destination.
Motion graphics	Minimum typography standards, logo placement rules, target runtime, outro guidance, and a final brand review before approval.
Brand governance	Shared rules gave internal teams and creative contributors a clear definition of 'ready for review.'

The management decision underneath the template

Standardization should remove low-value decisions, not remove judgment. The goal was to stop teams from repeatedly debating file sizes, asset locations, approval routes, or brand basics so they could spend more time on the message, audience, offer, and campaign.

Global coordination

The same playbook also created a common reference point for regional marketing coordination, including teams in the UK, Mexico, and India. That matters because global consistency does not come from asking every market to work identically. It comes from defining the shared operating rules while giving regional teams clarity about where they can adapt.

WHAT THIS CASE STUDY DEMONSTRATES

I build the marketing infrastructure that lets good teams execute.

This work sits at the intersection of marketing leadership and hands-on operations. It requires understanding the campaign itself, the people doing the work, the systems they use, the approval structure, and what Sales or another downstream team needs after Marketing finishes its part.

Marketing operations

Workflow design, intake, status management, approvals, documentation, process ownership, and continuous improvement.

Demand generation infrastructure

Connecting campaign execution to systems, roles, creative, content, and handoffs rather than managing each channel in isolation.

CRM & marketing technology

Using platforms such as HubSpot, Monday.com, and Brandfolder as parts of an operating model, not standalone tools.

Creative & brand operations

Templates, production standards, asset governance, version control, metadata, and reusable libraries.

Cross-functional leadership

Clarifying responsibilities across content, demand generation, creative, product marketing, regional marketing, and reviewers.

Scalable documentation

Turning institutional knowledge into processes another person can follow, manage, and improve.

Where I use this thinking now

I use the same approach when a company has plenty of marketing activity but the engine underneath it is inconsistent: leads are not handled the same way, CRM stages do not match the sales process, campaigns depend on heroics, reporting cannot be trusted, or the team has tools without a shared operating model.

Portfolio note

This case study has been adapted from an internal marketing operations playbook. Company-sensitive details, individual names, and proprietary working information have been removed. The processes shown reflect work I led and documented in a global B2B software marketing environment.