Future-proofing B2B marketing: How CMOs can lead through the AI transformation

Why your operating model and outsourcing strategy matter more than any single tool



Introduction

Seventy percent of the average B2B marketing budget is still absorbed by execution-heavy, internally managed work that delivers limited strategic leverage. Much of this work can now be streamlined, automated, or shifted to specialized partners as AI capabilities mature. The next phase of B2B marketing leadership will be shaped less by campaign creativity or tool selection and more by **how CMOs redesign the way marketing work gets done**.

Artificial intelligence (AI) has moved beyond isolated task automation. It is increasingly capable of coordinating multi-step workflows, routing work, applying rules, and supporting decisions with limited human intervention. While fully autonomous systems remain unreliable, platforms that support orchestration and agent-based execution are advancing quickly enough to materially reshape marketing operations over the next several years.

Yet most B2B marketing leaders today are unprepared. **They fall into one of four camps:**

1. AI-advanced CMOs actively rearchitecting their organizations
2. Experimenters, dabbling with AI for tactical gains
3. Delegators, unaware of the strategic potential of AI
4. Skeptics, underestimating the speed and scale of what's coming

What you'll get from this whitepaper

- **A step-by-step roadmap** to evolve your operating model for AI
- **A maturity model** to assess where you are and where to go next
- **Practical frameworks** to decide what to keep, automate, or outsource
- **Real-world use cases and metrics** to guide adoption
- **A 90-day plan** to operationalize intelligent automation

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The reality

AI is reshaping how marketing organizations operate by **shifting the balance between human judgment and execution at scale**. High-performing teams combine strategic oversight with AI-enabled production and an elastic network of specialized partners.

This paper offers a point of view that goes beyond common CMO advice like "just get started" or "encourage team experimentation. "While these are accessible entry points, they rarely lead to meaningful transformation.

Six months later, many CMOs still cannot point to measurable productivity gains, better customer experiences, or strategic differentiation.

When the board asks, *"What are we doing with AI?"* the answer is often a disappointing: "We use it for content production."

You cannot lead AI adoption without first understanding and reimagining your marketing operating model and deciding, step by step, what to keep, automate, or outsource.

AI adoption requires a systems transformation. The same rigor required to convert marketing from a bloated, order-taking task-execution cost center to a modern growth engine now underpins every high-value AI use case.

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Marketing operating model maturity matrix

To move from fragmented execution to coordinated, AI-enabled delivery, CMOs need a clear view of their current operating state. The framework below outlines four stages that describe how work is organized, how AI is applied, and how external partners are used.

Stage	Operating model traits	AI adoption	Outsourcing role
1 Ad hoc	**Siloed tasks, informal handoffs**	Isolated experiments	None or ad hoc freelancers
2 Defined	**Documented workflows, basic KPIs**	ChatGPT-level task support	Project-based agencies
3 Optimized	**Streamlined processes, SLAs**	Integrated point solutions	Retainer partners for execution
4 AI-accelerated outsourced	**Orchestration layer governs work, metrics tied to revenue**	Agentic workflows, predictive decisioning	Specialist pods handle volume execution under SLAs

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The rise of the operational CMO: Getting your house in order first

Redesigning the marketing operating model requires CMOs to engage more deeply with how work happens such as who does what, how long it takes, and where handoffs break down. Without visibility into workflows, handoffs, and bottlenecks, AI investments remain superficial.

This operational clarity requires:

1. Documenting how marketing work gets done day to day.
2. Critically reviewing workflows to know who does what, when, and how long.
3. Reimagining those workflows to streamline and accelerate.
4. Evaluating all work requests and setting guardrails so resources focus on high-impact initiatives.
5. Making build-vs-buy decisions: Which steps stay in-house, which are automated, and which move to specialized external partners.
6. Implementing SLAs so execution meets expectations, on time and within budget.

Once CMOs step into operational ownership, they gain:

- A blueprint of workflows, roles, systems, and friction points
- Data on redundant tasks, delays, and value leaks
- A foundation for automation, orchestration, and agent oversight
- Clarity on which functions should be outsourced to unlock scale and cost leverage

Case in point

A midmarket SaaS CMO discovered that content creation involved 14 handoffs and 8 approval gates resulting in a six-week timeline for a single blog post. After redesigning the workflow with AI at key checkpoints and reallocating production to an external content pod, they reduced production time to two days while maintaining quality.

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The AI maturity gap: Why most CMOs are falling behind

There are two very different trajectories forming: those that experiment with AI in isolation, and those that design for scale from the start. The difference in outcomes is exponential, not incremental.

The experimenter	Two divergent paths	The architect
Implement ChatGPT for email drafting	Month 1-3	Map core workflows and decision points
Train team on prompt engineering	Month 4-6	Redesign operations with AI-human-outsourcer collaboration
Implement point solutions for discrete tasks	Month 7-12	Implement orchestrated workflows with human oversight
Begin workflow integration	Year 2	Scale intelligent systems across marketing
10-15% productivity lift in isolated areas	Result	**50-200%** throughput increase plus higher quality

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Six imperatives for B2B CMOs

AI adoption requires a new leadership playbook. The following imperatives outline where CMOs should focus their attention.

1 Lead AI literacy from the top

- Champion AI use cases in strategy, planning, and decision support
- Provide role-specific training and hands-on sandboxes
- Hold monthly “AI Strategy Sessions” to reimagine a full process/series of tasks or end-to-end workflow

2 Redesign the operating model

- Map current workflows in detail
- Challenge every step: eliminate, automate, or outsource
- Deploy an outsourced shadow pod so campaigns keep moving while you pilot new flows

3 Establish human-in-the-loop governance

- Define QA, escalation, and ethical guidelines for AI outputs and partner deliverables
- Use a tiered risk model from full automation to mandatory review
- Embed a vendor governance playbook with SLAs

4 Automate low-variance workflows first

- Target list enrichment, asset resizing, SEO rewrites, and competitor monitoring
- Bundle AI agents with outsourced teams for continuous optimization

5 Invest in upskilling and AI-native hiring

- Build tracks for content, ops, analytics, and campaign roles
- Crosstrain with IT and data science
- Hire systems thinkers fluent in orchestration and agent management
- Leverage talent arbitrage (a lean core team plus offshore pods)

6 Champion change and drive cultural adoption

- Communicate a clear vision of AI-augmented marketing
- Use “show-don’t-tell” wins to build confidence
- Address displacement fears through transparency

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Measure ROI with meaningful KPIs

Measuring the real impact of AI requires more than activity metrics. **This framework helps CMOs track outcomes that matter across speed, quality, scale, and innovation.**

***Tip:** Replace with your own data, or use industry benchmarks by sprint phase (e.g. Sprint 1 = 15% cycle time reduction).*

Category	Example metrics	Baseline	Sprint			
			1	2	3	4
Efficiency	Output per hour					
	Cycle time					
	Team capacity					
Quality	Error rates					
	Brand compliances					
	Creative effectiveness					
Scale	Campaign volume					
	Market coverage					
	Content velocity					
Innovation	New capabilities					
	Competitive differentiation					

Set baselines first and measure uplift every sprint.

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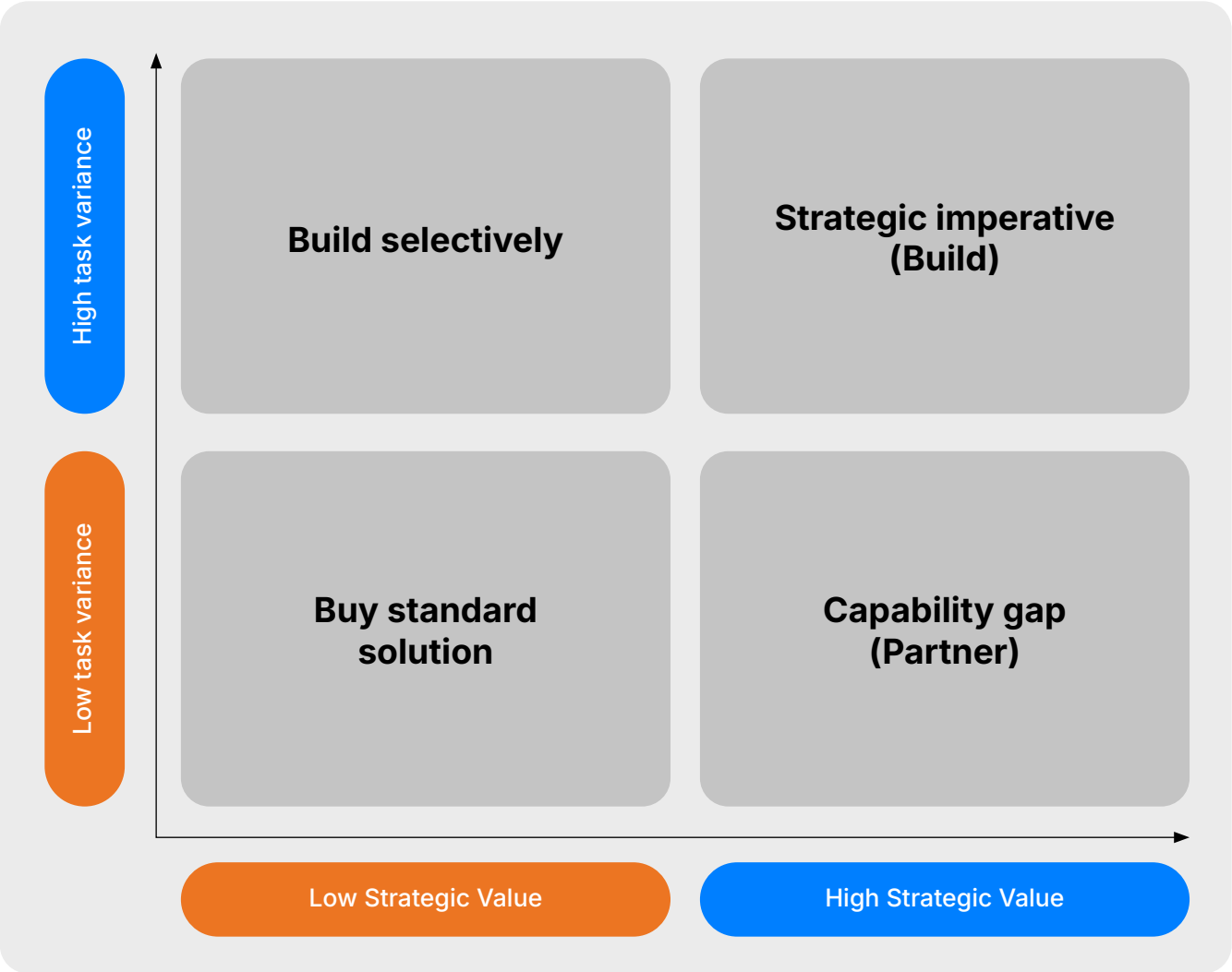
Operating model design

Designing an operating model that supports AI-accelerated marketing requires two core frameworks: one for strategic decision-making (what to build, buy, automate, or outsource), and one for operational structure (how work flows through the organization). Together, they enable CMOs to confidently orchestrate scalable marketing systems.

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1 Build-buy-AI decision grid

This decision grid helps CMOs classify work along two critical dimensions: **strategic value** and **task variance**. The goal is to determine the right execution model (AI, in-house, or outsourced) for each type of work:



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2 Three-tier operating stack

The **Three-Tier Stack** offers a practical framework for structuring modern marketing teams, ensuring each function is performed by the right resource with the right tools at the right layer.

Strategic Core

Who it includes	CMO, brand leadership, insights teams, and go-to-market strategists
Function	This layer is responsible for **defining strategic direction, market positioning, customer segmentation, and enterprise alignment.** It owns decisions that shape long-term differentiation and value creation.
Why it matters	Strategic decisions require institutional context, market foresight, and cross-functional influence. This work cannot be automated or delegated without compromising quality or control.
Example applications	• Repositioning the brand in response to market shifts or M&A activity • Defining the lead qualification framework in coordination with sales and product • Establishing messaging guardrails for AI-generated content • Identifying new growth segments based on behavioral and firmographic data

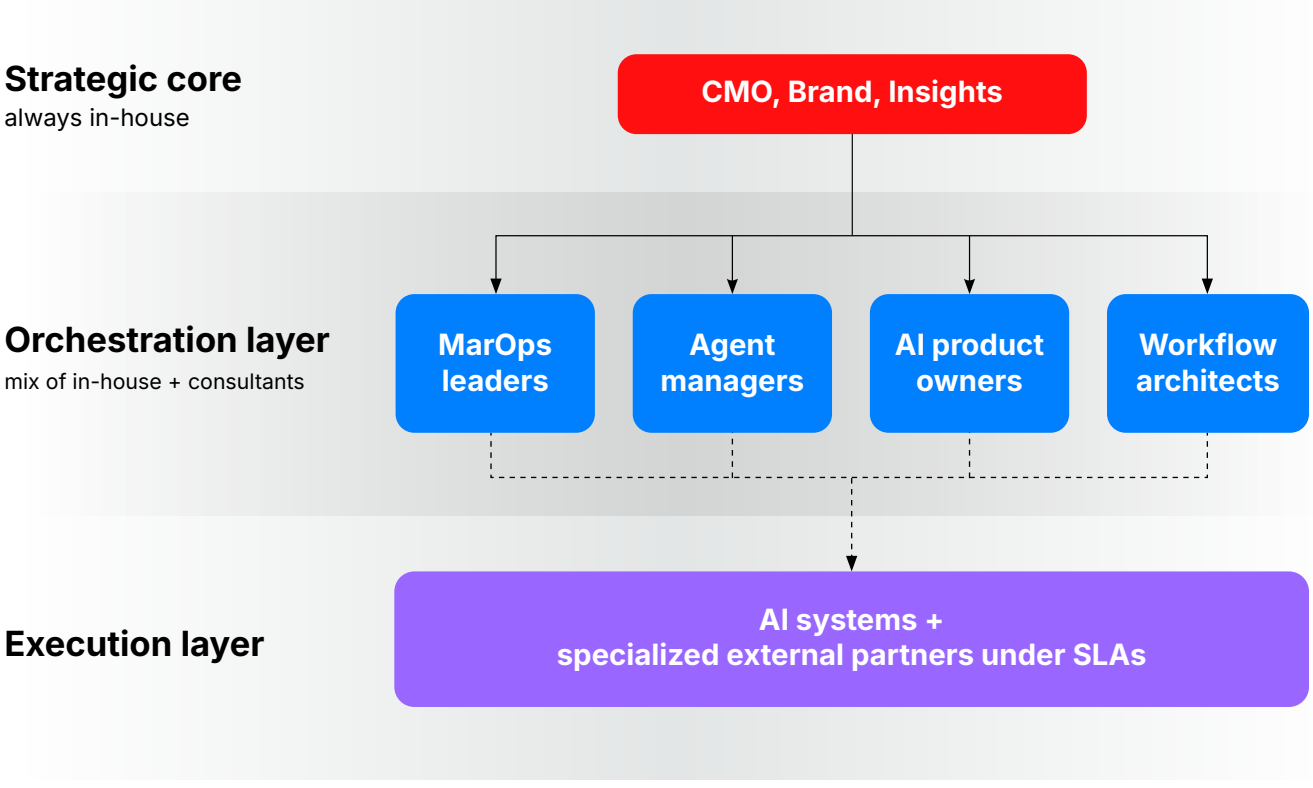
Orchestration Layer

Who it includes	Marketing operations leaders, AI product owners, workflow architects, and vendor governance teams
Function	This layer **translates strategic priorities into scalable processes.** It manages the marketing tech stack, oversees workflow design, enforces quality standards, and governs AI systems and partner performance.
Why it matters	Without this connective tissue, execution becomes fragmented, tools are underutilized, and strategic alignment is lost. Orchestration ensures accountability, consistency, and adaptability across the system.
Example applications	• Designing campaign frameworks that standardize execution across regions • Defining escalation and approval workflows for AI-generated assets • Managing SLAs and vendor output across outsourced pods • Overseeing experimentation with generative AI and automation tools

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Execution Layer

Who it includes	AI platforms, managed service providers, global delivery teams, and offshore pods
Function	This layer **delivers high-volume, repeatable tasks at scale**—campaign execution, asset production, list management, and content repurposing. It is optimized for speed, cost-efficiency, and task specialization.
Why it matters	The majority of marketing execution is predictable and can be systematized. Leveraging automation and outsourcing here enables the internal team to focus on higher-value, strategic work.
Example applications	• Atomizing a webinar into multiple content assets for different channels and segments • Using AI to personalize nurture flows based on engagement behavior • Translating content across languages and regions within brand guidelines • Executing campaign deployment, UTM tagging, and performance reporting at scale



Your orchestration layer is where AI and outsourcing intersect. That's where the most transformative gains are unlocked; through automation, reusability, and governed execution.

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Where AI and outsourcing drive immediate impact

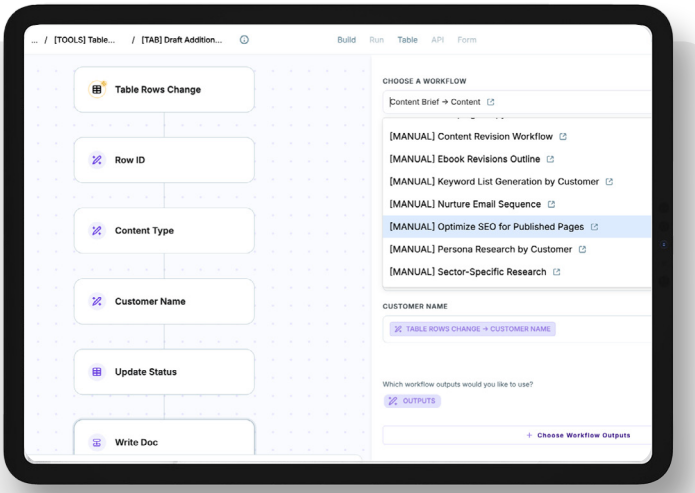
The following use cases demonstrate where CMOs can apply both levers to achieve faster time to value, greater agility, and improved ROI across core marketing functions.

Content creation and optimization

- Draft, refine, personalize, and atomize content across formats
- Use AI for SEO, headline testing, and content scoring
- Repurpose assets efficiently at scale

Advanced application:

Leading companies are building *adaptive content systems* where a single brief spawns dozens of format-specific assets that automatically optimize based on performance data.



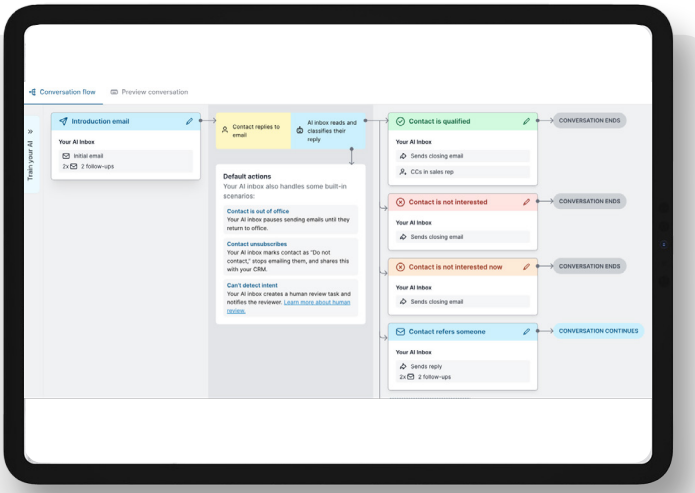
↑ CopyAI's workflow automation to streamline content creation and optimization.

Lead generation and nurturing

- Apply predictive lead scoring and qualification models
- Tailor nurture flows based on AI-analyzed behaviors and stage progression

Advanced application:

AI-powered intent orchestration analyzes signals across channels and automatically adjusts targeting, messaging, and sales handoffs in real time.



↑ 6sense's AI Email feature auto-classifies replies, adapts outreach accordingly, and ensures timely handoffs or follow-ups, enabling scalable, intent-based engagement.

Screenshots sourced from Copy.ai and 6sense platforms. Used for illustrative purposes only.

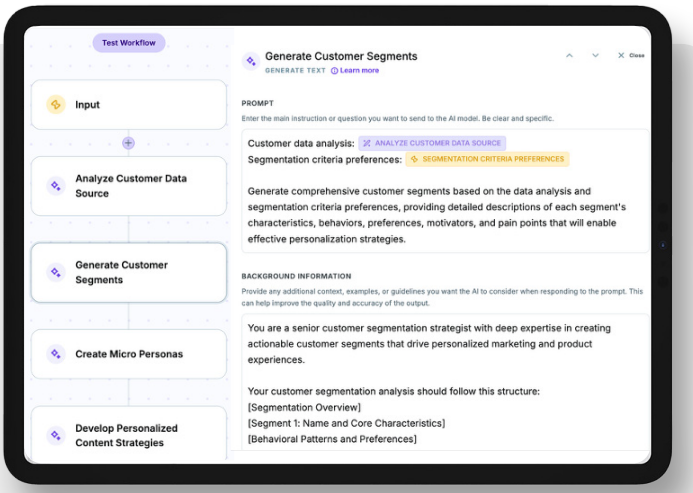
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Customer analytics and personalization

- Generate deep segmentation and micro-personas
- Tailor web, product, and content experiences across the lifecycle

Advanced application:

Real-time journey engines trigger immediate experience changes across all touchpoints, creating truly individualized buying paths.



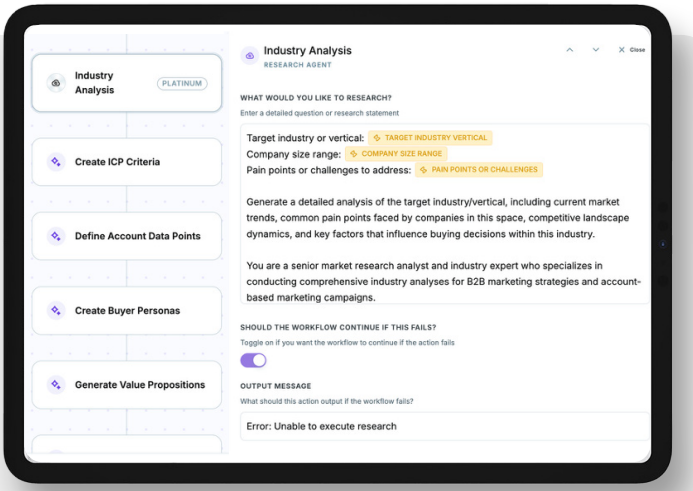
↑ CopyAI's workflow automation to conduct customer segmentation analysis and personalize content strategies.

Account- based marketing (ABM)

- Analyze intent and firmographic data to identify high-fit accounts
- Orchestrate persona-specific content journeys across channels

Advanced application:

AI-driven account intelligence networks continuously monitor targets, detect buying windows, and orchestrate precision engagement with marketing, sales, and customer success.



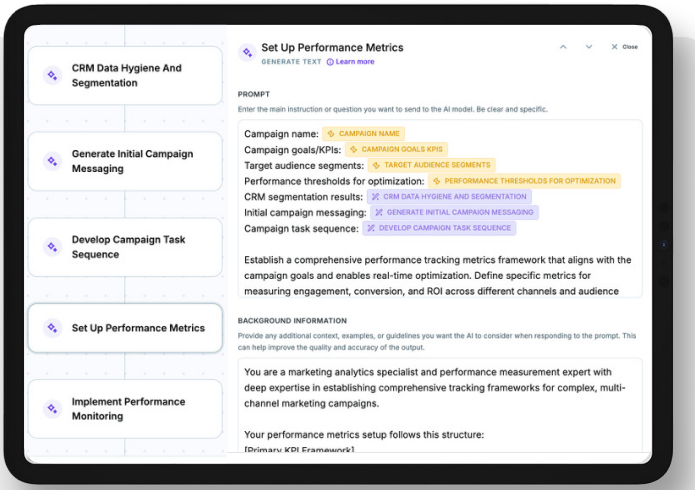
↑ CopyAI's workflow automation for end-to-end ICP analysis and value proposition generation.

Marketing operations and automation

- Automate CRM hygiene, task sequencing, and reporting
- Streamline campaign orchestration with AI-assisted workflows

Advanced application:

Self-optimizing campaign systems automatically reallocate budget, adjust messaging, and refine targeting based on real-time performance and market conditions.



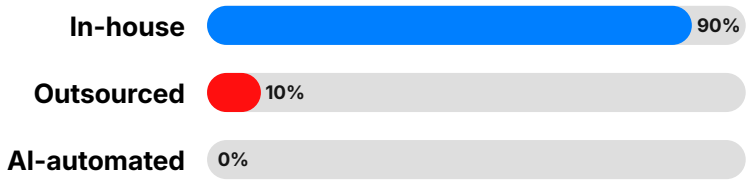
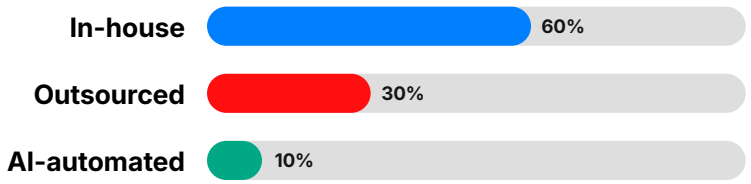
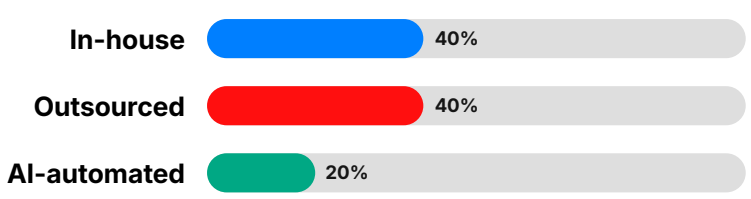
↑ CopyAI's workflow automation supporting CRM data hygiene maintenance and campaign orchestration.

Screenshots sourced from Copy.ai and 6sense platforms. Used for illustrative purposes only.

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90-day operational launch plan

A pragmatic 90-day plan allows CMOs to audit, redesign, and implement new workflows without slowing down momentum. By methodically shifting work from in-house to AI and specialized external partners, organizations can accelerate results while reducing operational drag.

Sprint		
Week 1-4	**Phase 1: Audit** • Map workflows • Baseline metrics • Assess core vs non-core.	
Week 5-8	**Phase 2: Redesign** • Eliminate steps • Stand up shadow pod • Draft governance	
Week 9-12	**Phase 3: Implement** • Deploy redesign flows • Embed AI • Transition work shares, measure uplift	

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Conclusion

The CMO as architect of intelligent, hyperautomated growth

Technology amplifies good processes but cannot fix broken ones. CMOs who:

1. **Map and measure day-to-day operations**
2. **Challenge and streamline every workflow**
3. **Set guardrails for high-impact work only**
4. **Decide step by step what to keep in-house, automate, or outsource**
5. **Hold all contributors to SLA-backed accountability**

...will build leaner, faster, more resilient growth engines.

The AI-powered future belongs to leaders willing to rebuild their operating model today.

About the author



Lisa Cole serves as the CMO at 2X, where she helps marketing leaders deliver greater impact with fewer resources. Former CMO for Huron, FARO Technologies, and Cellebrite, and author of Brand Gravity, The Limitless CMO, and The Revenue RAMP, Lisa has a proven track record of transforming marketing organizations into high-performing, scalable growth engines. She specializes in leveraging AI, strategic outsourcing and growth marketing strategies to scale marketing, driving operational excellence, and accelerating revenue growth.

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About 2X

2X helps GTM leaders achieve greater impact while lowering costs through its comprehensive managed services delivery model. Building on its foundation as the leader in B2B Marketing-as-a-Service (MaaS), 2X now provides end-to-end go-to-market orchestration including GTM engineering, marketing operations and MarTech management, campaign build and optimization, content and creative production, revenue operations, sales technology implementation, and strategic consulting services. 2X is a services partner of 6sense, Salesforce, Adobe, HubSpot, Gong, Bombora, Clay, WordPress, Google, Meta and many other leading revenue platforms.

With nearly 1,300 team members globally, 2X is backed by private-equity firms Recognize and Insight Partners. In 2025, 2X was recognized as one of the fastest-growing companies in the US by Inc. 5000 and the Financial Times: FT ranking of The Americas: Fastest-Growing Companies.

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