Whitepaper

# Aligning CFO and CMO for B2B enterprise success

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# Executive summary

When financial discipline meets marketing ambition, growth becomes inevitable.

The collaboration between the Chief Financial Officer (CFO) and the Chief Marketing Officer (CMO) is no longer optional; it's a critical driver of enterprise success. Yet alignment between these roles remains difficult. Budget scrutiny, differing metrics of success, and siloed decision-making continue to limit marketing's strategic potential.

This whitepaper outlines key challenges that block CFO-CMO collaboration and proposes pragmatic strategies for unlocking shared success. It also introduces the role of marketing as a service (MaaS) in supporting scalable, accountable marketing execution that meets both financial and growth targets.

**Key takeaways:**

1. **Connect strategy to ROI:** Anchor marketing goals in measurable business outcomes.
2. **Make decisions with data:** Improve visibility and accountability through shared analytics.
3. **Bridge the silo gap:** Create cross-functional alignment to support scale.
4. **Use MaaS with intent:** Increase efficiency by shifting low-differentiation work to flexible partners.

CFOs and CMOs who align can lead not only performance, but transformation. Together, they turn marketing into a growth engine the business can measure and trust.

# Introduction

The CFO and the CMO often come from opposite worlds: one rooted in financial stewardship, the other in creative growth. But the best-performing enterprises are the ones where these leaders align, not divide.

The most successful B2B enterprises today don't treat these functions as separate. They align them: closely, consistently, and strategically.

This alignment matters now more than ever. The demands on CMOs are intensifying. Shorter tenures, rising expectations for ROI, and evolving tech stacks have raised the bar. At the same time, CFOs are under pressure to optimize spend and ensure every investment contributes to growth.

Done right, CFO-CMO collaboration doesn't just solve budget friction. It creates competitive advantage.

# Challenges to CFO-CMO alignment

## Differing priorities

1. **CFOs prioritize** measurable ROI, cost control, and financial risk.
2. **CMOs focus** on long-term brand growth, customer engagement, and market share.

This creates a natural tension. While the CFO seeks predictable returns in the short term, the CMO often invests in initiatives that take longer to show impact. Without a shared understanding of timelines and value, alignment falters.

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## Measurement and attribution

1. **Marketing outcomes** are difficult to connect directly to revenue.
2. **Inconsistent KPIs and attribution models** create further confusion.

Brand campaigns, customer relationships, and content programs rarely tie neatly to financial results. Without clear data linking effort to impact, marketing can appear subjective, limiting its credibility with finance.

## → Data silos

1. **Marketing and finance** often work from separate systems.
2. **Limited analytics capabilities** hinder ROI measurement.

When teams lack shared tools or visibility, decisions become fragmented. Marketers may struggle to surface the insights CFOs need to justify spend or allocate resources more effectively.

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## → Organizational barriers

1. **Teams operate in silos** with unclear accountability.
2. **Legacy practices** often go unquestioned.

Without integrated planning, efforts remain disjointed. Many marketing investments are inherited or repeated out of habit, rather than evaluated against current strategy or outcomes.

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## → Resource constraints

1. **Specialized marketing talent** is hard to hire and retain.
2. **Budget limits** make it difficult to balance short- and long-term priorities.

Marketing is often under pressure to do more with less. This can lead to a reactive approach, focusing on immediate results at the expense of strategic growth.

# Strategies for enhanced collaboration and growth

The key to unlocking the true potential of the CFO-CMO relationship lies in shifting the perception from a potentially antagonistic dynamic to a powerful partnership. Here are the building blocks:

## 1 Align on strategic objectives

CFOs and CMOs must anchor their collaboration in shared business goals. Most enterprise objectives fall into three categories:

- **Cost efficiency:** Reduce overhead, improve operational performance, and allocate resources effectively.
- **Growth:** Capture market share, strengthen brand equity, and deepen customer relationships.
- **Innovation:** Support product launches, enable digital transformation, and drive recurring revenue models.

By linking marketing initiatives to these goals, both teams can evaluate investments through a shared lens. For instance, targeted campaigns designed to increase market share directly support growth. Efforts like ABM or lead nurturing become more compelling when tied to revenue outcomes.

## 2 Foster open communication

Transparency builds trust. To achieve alignment:

- **Establish regular meetings and shared dashboards** to review performance.
- **Create space for honest discussions** about goals, risks, and resource needs.
- **Encourage mutual respect** by acknowledging the unique contributions of each function.

Joint visibility into key metrics helps marketing stay responsive to financial targets, and allows finance to better understand the logic behind marketing decisions.

Using a MaaS model, CareATC aligned marketing and finance through shared KPIs and revenue-driven strategy. The result: a total addressable market (TAM) database, precision-targeted campaigns, and a $28M pipeline; accomplished while improving cost efficiency.

CareATC Case Study →

## 3 Leverage data-driven decision-making

Stronger analytics improve both performance and partnership:

- **Define consistent KPIs** that reflect business-level outcomes.
- **Use data to evaluate campaign performance** and adjust spend accordingly.
- **Embed finance stakeholders into marketing workflows** to build shared fluency.

When both teams work from the same dataset, resource decisions become easier and more objective. Tools like marketing automation platforms or CDPs help quantify outcomes and reveal where to optimize.

## 4 Break down silos

Cross-functional collaboration promotes accountability:

- **Host joint planning sessions** to align on priorities.
- **Involve finance in campaign strategy;** involve marketing in budgeting.
- **Integrate marketing and customer service** for a more seamless customer experience.

The more interconnected the teams, the more agile the organization. Removing internal walls allows leaders to shift quickly with market needs.

## 5 Position marketing as a long-term investment

To build sustainable growth, shift the conversation:

- **Focus on customer lifetime value**, not just immediate returns.
- **Emphasize marketing's role** in brand strength, loyalty, and retention.
- **Make the case for reinvestment** when financial conditions improve.

Reframing marketing as a lever for durable revenue, not just spend, helps secure long-term commitment from finance.

# Partnering to achieve enterprise goals

A key enabler in achieving enterprise-level goals is the strategic adoption of MaaS, a model used by companies like SAP, FARO, and Sandler. MaaS provides a structured way to address many CFO-CMO challenges by outsourcing marketing functions such as content creation, digital campaigns, and analytics.

For example, MaaS has driven up to $2.3 million in marketing-influenced revenue for a leading digital content management company, demonstrating its ability to link marketing activity directly to business outcomes.

**This model addresses several key challenges:**

- **Resource constraints:** MaaS provides access to specialized talent and a scalable workforce, reducing the need for in-house hiring and training. This helps relieve pressure on internal teams while ensuring access to modern tools and best practices.

- **Specialized expertise:** MaaS partners bring targeted capabilities in areas such as ABM, marketing automation, and data analytics; filling gaps often found in traditional teams.

- **Accountability:** MaaS models are typically built around clear deliverables and performance outcomes. This helps ensure a strong focus on ROI and provides a consistent framework for assessing effectiveness.

- **Flexibility:** With MaaS, organizations can scale their efforts up or down as needed, adjusting spend based on performance or shifting business priorities.

When implemented well, MaaS aligns with CFO priorities such as ROI and cost efficiency, while empowering CMOs to deliver high-impact campaigns. Evaluating the trade-offs between in-house and external capabilities is critical, as is establishing clear service level agreements (SLAs) and performance metrics. Seamless integration between in-house and outsourced teams is also essential for long-term success.

# Practical applications of MaaS

By leveraging MaaS strategically, CFOs and CMOs can work together to deliver business value across four key areas:

## 1 Drive revenue growth

MaaS enables data-driven go-to-market strategies that align with broader business goals:

- Collaborate on campaign planning based on pipeline needs
- Target high-value accounts through precision ABM and analytics
- Reinvest in high-performing channels to maximize ROI

SAP

With MaaS, SAP achieved a $1:$112 ROI on total program investment to pipeline value, cut cost per engaged account by 60%, and engaged 2.5x more accounts on a flat marketing spend.

SAP Case Study →

## 2 Improve customer lifetime value

Sustainable growth depends on retaining and expanding existing customer relationships. With MaaS, companies can:

- Develop personalized retention and loyalty programs
- Enhance customer experience across digital and human touchpoints
- Analyze customer feedback to improve product and service delivery

SANDLER

Within six months of implementing MaaS, Sandler achieved a 30% increase in marketing-influenced pipeline and a 300% boost in web engagement.

Sandler Case Study →

## 3 Manage risk and uncertainty

In dynamic markets, proactive risk management is essential. MaaS providers support this through:

- Competitive analysis and market research to inform decisions
- Scenario planning and contingency development
- Continuous monitoring of financial and market indicators

By consolidating and outsourcing marketing efforts through a MaaS model, FARO reduced its budget by over 35% while improving conversion rates.

FARO Case Study →

## 4 Build a sustainable competitive advantage

MaaS strengthens long-term positioning by supporting innovation and operational maturity:

- Adopt the latest marketing technologies without heavy upfront investment
- Accelerate digital transformation through specialized expertise
- Foster a culture of continuous improvement and real-time decision-making

By leveraging a MaaS model, JAGGAER launched a Looker Studio dashboard that enabled real-time, data-driven decisions. Within two months, they reduced labor costs by $77,459, engaged 147 unique accounts, advanced 129 to 6QA status, and created 11 new opportunities.

JAGGAER Case Study →

When used strategically, MaaS aligns directly with CFO priorities: cost efficiency, measurable ROI, and risk management while enabling CMOs to scale high-impact marketing programs with greater agility.

# Conclusion

CFO-CMO alignment is no longer optional in the current competitive B2B environment. With growth harder to capture and spending under closer scrutiny, finance and marketing leaders must move beyond silos and operate as strategic partners.

MaaS offers a practical path forward. It enables scalable, accountable execution while aligning marketing activity to financial priorities like ROI, efficiency, and measurable outcomes.

When CFOs and CMOs collaborate through shared metrics and unified planning, they drive smarter investment decisions and faster response to market shifts. Marketing evolves from a cost center into a key driver of growth and enterprise value.

## About 2X

2X is a leading B2B marketing-as-a-service firm that helps marketing leaders achieve greater impact while lowering costs through its managed services delivery model. Servicing over 150 clients including SAP, Ricoh, Docker, Hyland, Seismic, Qlik, and GoTo, 2X provides dedicated and highly skilled FTEs who specialize in marketing operations, martech management, campaign execution, content and creative production, and strategy consulting services. With more than 1,000 team members globally, 2X is backed by private equity firms Recognize and Insight Partners and has been recognized as one of the fastest-growing companies in the US by Inc. and the Financial Times. For more information, visit 2X.marketing or follow us on LinkedIn.

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## Our Success Stories

SANDLER

Increased **marketing-influenced pipeline by 30%** and **web engagement by 300%.**

SAP

**Achieved a $1:$112 ROI** on overall program investment to pipeline value.

JAGGAER

**Reduced labor costs by $77,459** in two months—proving high efficiency doesn't require a high price tag.

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