BUILD MARKETING INFRASTRUCTURE.

A six-month, hands-on transformation for private equity portfolio companies that need capable teams, measurable operations, and scalable marketing systems—without waiting for a permanent CMO.

BUILDING 0–1

Establish the function from the ground up.

MARKETING DEVELOPMENT

Strengthen an existing team and operating model.

THE SIX-MONTH MARKETING OPERATIONS BOOTCAMP

01

DAY 30

DIAGNOSE

Assess team capabilities, agency performance, MarTech, budgets, workflows, lead funnels, and marketing compliance risks. Identify wasted spend, operational gaps, attribution blind spots, and immediate opportunities to improve efficiency and execution.

02

DAY 60

PRIORITIZE

Deliver an operational assessment, resource recommendations, and a prioritized transformation roadmap. Address quick wins, optimize vendor and technology investments, establish performance benchmarks, and introduce AI adoption and marketing governance standards.

03

DAY 120

BUILD WITH THE TEAM

Work alongside staff to build campaigns, lead-generation funnels, reporting dashboards, workflows, SOPs, and marketing systems. Coach junior marketers through hands-on execution, AI-assisted production, prompt development, quality assurance, compliance best practices, and cross-functional collaboration.

04

DAY 180

HAND OFF STRONGER

Finalize operational playbooks, brand and compliance guidelines, AI usage policies, training resources, and onboarding materials. Transfer knowledge, strengthen team independence, and support permanent leadership recruitment and onboarding for a sustainable transition.

PLAYER-COACH DELIVERY / I DO THE WORK ALONGSIDE YOUR TEAM

WHAT THE BUSINESS GAINS

Practical infrastructure, not a strategy deck left on a shelf.

01 OPERATING CLARITY

Capabilities and workflow assessment; marketing and vendor-spend review; prioritized implementation roadmap; recommendations for team, technology, and agency investment.

02 GOVERNANCE & RISK

Documented approval processes, brand standards, consent/privacy and marketing-claim review workflows, and escalation paths for relevant legal or compliance specialists.

03 REPEATABLE EXECUTION

Campaign and launch playbooks, SEO/AEO and content workflows, email/lifecycle programs, lead-management coordination, analytics, and reporting architecture.

04 A CAPABLE TEAM

Role design, hiring and agency evaluation support, hands-on coaching, centralized SOP and resource library, structured onboarding, and transition readiness.

PROVEN EXECUTION / ZERO-TO-ONE BUILD

Built and scaled marketing operations from the ground up for **three private equity-backed portfolio companies since 2020**. Established demand generation, MQL processes, marketing automation, attribution, compliance and privacy standards, and AI-enabled workflows while hiring, training, and developing internal teams to sustain execution.

25	YEARS IN MARKETING	16	YEARS IN LEADERSHIP	37	COMPANIES

LET'S BUILD A STRONGER MARKETING FUNCTION.

Lori Ann Reese | Fractional CMO & hands-on marketing operator

DISCUSS A PORTFOLIO COMPANY