5 Steps to Restructure Marketing — And Keep Your Sanity

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Restructures often feel like somebody opened Pandora’s box. They don’t have to. By following these five steps, CMOs can ensure their teams are informed — and empowered — at every stage of the change process, with better, cheaper, faster results. You read that right: It will be over faster.
Overview

Key Findings
• Restructures frequently result in mass confusion, frustration, fatigue and many other negative outcomes that cost organizations huge sums in lost productivity, employee sick leave and turnover.
• Most organizational restructures are planned and implemented top-down, which results in longer, more expensive, less successful restructures with more such negative outcomes.
• Co-creating a restructure end-to-end with all impacted individuals takes more time and effort upfront, but shortens implementation times, costs less overall and generates better results with fewer negative outcomes.

Recommendations
To redesign your marketing organization and retain your sanity:
• Get problem buy-in: List your stakeholders and get their buy-in for the problem before you ever mention the word “restructure” to anyone.
• Get solution input from people who do the work: Design your restructure solution with all (or representatives of all) impacted marketers, using either an employee- or leader-led process and a “who, when, how” plan.
• Announce the plan and plan the change: Announce the agreed-upon solution widely, then co-create a rollout plan that takes your team’s capacity for change into account.
• Build capability to change: Continue to foster open communication to inform collaborative development of governance, tools and connections.
• Keep an eye on change: Track metrics related to your original problem, your solution implementation and your team’s level of wellness throughout the change.
Introduction

Organizational restructures are usually decided top-down. Senior leaders identify problems, develop solutions, then communicate changes to employees in one-to-many messaging that explains (typically with great positivity and excitement) what changes are being made, why they’re being made and what employees should do differently. Most of these restructures fail.

Business leaders believe top-down change management ensures execution will be more consistent, more efficient and faster. The opposite is true: Top-down restructures typically result in lower quality solutions; longer, slower, less successful implementation; and a confused, passive, resistant workforce.

Why? Because employees in a top-down restructure feel that change is happening to them, rather than with them. They resent having to execute poorly designed solutions developed by people too far from the work to actually understand it. So they delay making changes, and when they finally do try to change, they don’t try very hard. Then, if the change fails to work as leaders promised, their frustration validates their resentment.

There’s a better way to restructure. By involving the people who do the work at every stage of your process, you can ensure understanding, proactivity and buy-in from your team, resulting in a better solution that implements more quickly and more successfully.

On the next page, we walk you through five steps to co-create your restructure with your team, from problem definition and solution development through implementation. For a process overview, see Figure 1.

Including non-manager employees in redesign decisions more than doubles the likelihood of restructure success — the greatest impact of any employee group. Yet non-manager employees are the least likely to be consulted about a restructure.
Figure 1: Co-Created Restructure Process Overview

The Plan

Co-Creation

Get Problem Buy-In → Develop Solution → Plan Implementation → Roll Out → Track Progress

Leader-Led

What Really Happens

Get Problem Buy-In → Develop Solution → Plan Implementation → Roll Out → Track Progress

Leader-Led

Source: Gartner
“I’ve already rolled out my restructure and it’s not going well. What do I do?”

Keep reading. Because the below guidance walks you through a restructure from beginning to end, it can help you identify where you left critical stakeholders out of the process. Fixing your problems may very well necessitate backtracking a few steps from where you are now to redefine the problem or redesign the solution (on a smaller scale, hopefully). As you read, look for logical places you could circle back on your process in a more collaborative way.

**Analysis**

**Step 1: Get Buy-In for the Problem — Not the Solution (Yet)**

Buy-in starts with listening, not talking, so before you ever mention the word “restructure,” find out whether other people even agree that change is needed. Once you know where they stand, you’ll have a much easier time persuading them of a restructure. Then, if you also involve them in designing the new structure (Steps 2 – 5), they’ll thank you for letting them solve “their” problems.

**Build a Stakeholder Map**

To ensure you listen to everyone with a stake in a restructure, turn a copy of your org chart or operating model map into a stakeholder map. Eliminate from your starting document anyone who wouldn’t be impacted by the restructure (because they’re not on the affected team, never work with that team, don’t use any of that team’s outputs, etc.), and keep anyone who would. Make sure you consider all potentially relevant individuals in these four groups:

1. Executives with any kind of power over marketing
2. Senior business partners in other functions with whom marketing regularly collaborates
3. Marketing managers
4. Marketing non-managers
Once you have a completed map of impacted stakeholders, reach out to each individual and elicit their view of your situation. This is how you find out whether (and which) people agree that your problem is bad enough to warrant a restructure, that solving the problem should be a priority right now, and why or why not. As you talk to each stakeholder, add bullet points to your stakeholder map, noting:

- Objectives each stakeholder has that do (or do not) align with yours
- Objections you anticipate each stakeholder might have to a restructure
- A communications plan for each stakeholder (frequency, channel, level of detail, etc.), designed to keep/build buy-in should a restructure proceed

**Choose Your Listening Channels Carefully**

How you listen matters for your restructure’s success. Even in top-down restructures, management often makes a pretense of listening — but nobody really believes they’re actually listening. Sometimes managers simply go through the motions of collecting feedback as efficiently as possible, sometimes it’s obvious that they’ve already made a decision, sometimes their solution shows no consideration of feedback. Whatever the “tell” is, it’s important not just to listen, but to be perceived as listening.

You’ll get buy-in for a change more easily if you prioritize open, two-way communication as much as possible from this early stage. Efficiency is an important concern, but in most restructures, organizations err too much on the side of efficiency and rush through this (admittedly time-consuming) stage. Think of this buy-in stage as the foundation for your restructure and lay it carefully. If people feel heard, they will not only cooperate with you later on, they will also shower you with information now that helps you make better decisions. And that will help you avoid even more time-consuming (and costly, frustrating) adjustments during implementation.

Table 1 illustrates some of the pros and cons of listening in different ways. In general, one-on-one conversations communicate “I value your perspective” most powerfully, and such conversations can be delegated to managers who then communicate the feedback back up the chain. Surveys say “I value your perspective” least powerfully. Group conversations (including focus groups) are a middle point between these, with their own unique challenges given their social dynamic. If you use group meetings or focus groups, be sure to identify individuals who are usually quiet in groups and give them opportunity to express themselves privately, in person or in writing.
Which of these listening channels you choose for each stakeholder will depend on how many people you need to talk to, who they are, where they are and a host of other factors. Just remember to balance efficiency with genuine listening — and the perception of listening — and do your best.

<table>
<thead>
<tr>
<th>Listening Channel</th>
<th>Pros</th>
<th>Cons</th>
</tr>
</thead>
<tbody>
<tr>
<td>1:1 meeting</td>
<td>Individual feels your personal attention shows you value their perspective</td>
<td>Time-consuming</td>
</tr>
<tr>
<td>Group meeting</td>
<td>Individuals have opportunity to express themselves fully</td>
<td>Some people may be uncomfortable expressing themselves in a group or may “infect” others with negativity</td>
</tr>
<tr>
<td>Manager—employee conversation</td>
<td>Employees feel management has heard them</td>
<td>Manager may bring you filtered/biased feedback</td>
</tr>
<tr>
<td>Peer-led focus group</td>
<td>Individuals feel safe expressing ideas that managers may not approve of</td>
<td>Some people may be uncomfortable expressing themselves in a group or may “infect” others with negativity</td>
</tr>
<tr>
<td>Survey</td>
<td>Efficient for large teams</td>
<td>Does not communicate that management values dialogue</td>
</tr>
</tbody>
</table>

Source: Gartner (August 2021)
Don’t Rush

Once you’ve talked to everyone and your stakeholder map is complete, don’t rush to restructure. Take whatever time is needed to persuade key objectors that a restructure necessitating problem actually exists. You may never get everyone 100% onboard, but you should at least identify whose buy-in is critical for success (executives, irreplaceable employees, etc.), and ensure that you have theirs. Consider this favorite saying of change managers: “The pain of the same must feel greater than the pain of the change.” If it doesn’t yet feel that way to important stakeholders, you shouldn’t bother developing a solution until it does. Otherwise the pain of change for you will be so great you’ll wish you’d left things the same.

When most people (and all of your identified key people) agree that change is needed, proceed to Step 2.

In Step 1, build a stakeholder map to ensure you identify all the individuals who’ll be impacted by a restructure, and do some initial listening work with those people. Having this map — with notes of your initial conversations — is like having a map of obstacles. In Steps 2 – 5, you’ll continue talking with (and designing around) these same people, so it will be helpful to already know where your obstacles are.

Step 2: Get Solution Input From People Who Do the Work

Once a critical mass of stakeholders agree that a restructure would be worthwhile, you need a new structure. At this point, many leaders are tempted to hole up in their office and play checkers with the boxes on their org chart. If you feel that way, remember that most business leaders believe top-down solutioning ensures execution will be more consistent, efficient and faster — but it’s not. Because leaders are too far from the work itself to design 100% workable solutions, adjustments always need to be made during implementation. When this happens in a top-down restructure, employees are justified in saying (snarkily), “They should have foreseen this” and “They can’t get anything right the first time.”

In fairness, restructures are complex, difficult changes to make, and some knock-on effects always go unforeseen. But if you let go of total control over your solutioning process, allowing employees to co-create the solution with you, less will go unforeseen. And when something does, employees won’t be able to say so easily, “They should have foreseen this” — because they didn’t foresee it either.

There is some independent work for your leadership team in the initial stages of this step, but once that’s done, you should reengage with the crowd even more deeply than in Step 1. Here’s how you ensure that reengagement proceeds in an orderly fashion.
Develop Guidelines for Your Design Team
For a design team drawn from all levels of employees to work productively, it needs guardrails. You set the guardrails, telling them what they should focus on, and what they should and should not consider as options. Give them your:

• **Purpose:** Why are you restructuring?

• **Goals:** What objectives should a new structure achieve?

• **Priorities:** In the event of tensions or necessary trade-offs between goals, which goals should take priority?

• **Requirements:** What criteria must any new structure design meet (because of budgets, C-suite directives, HR/legal constraints, etc.)?

For example, if you’re merging marketing and communications to deliver more consistent brand messaging, you might give your design team the following:

• **Purpose:** Merge marketing and communications to deliver a more consistent stakeholder experience of our brand

• **Prioritized goals:**
  1. Eliminate inconsistent messaging across audience segments
  2. Develop clear lines of responsibility for customer- and non-customer audiences
  3. Consolidate agencies
  4. Streamline reporting

• **Requirements:**
  - No new hires
  - No hybrid roles
  - Max seven direct reports per manager
Since many people think of structure changes as strictly org chart changes, you may also want to remind your design team that they are free to suggest adjustments not just to the org chart, but to your:

- **Operating model:** How work enters and flows through the function
- **Governance:** Processes, procedures and other guidelines that staff should follow
- **Roles:** The cluster of tasks that particular individuals are responsible for
- **Networks:** People connections both within and outside the marketing team, including third parties (like agencies)
- **Systems:** The platforms and technologies used to get work done

Once your guidelines for the team’s work are clear, you need to consider roles for the redesign team, namely: Who leads?

**Choose Your “Let Go” Level**

Who leads your restructure design depends on your level of comfort with “letting go.” Have a look at the extremes in Figure 2, which depicts a co-creation spectrum.
Figure 2: Restructure Solution Co-Creation Spectrum

Illustrative

Leaders develop solutions with input from employees.

Employees develop solutions with input from leaders.

Indicate Balance of Leadership/Employee Responsibilities

Define Purpose, Goals, Priorities, Requirements
Root-Cause Problems
Research Best Practices
Develop New Org Chart and Operating Model
Develop New Governance
Recommend New Systems

Source: Gartner
On the “holding on more” (left) end of the spectrum, leaders develop solutions with ongoing input from employees. On the “letting go more” (right) end, employees develop solutions with ongoing input from leaders. Taking the restructure procedure outlined in the center of the figure as an example, these two extremes might look like Table 2.

### Table 2: Example Leader- and Employee-Led Restructure Solution Co-Creation Processes

<table>
<thead>
<tr>
<th>Stage</th>
<th>Leader-Led</th>
<th>vs.</th>
<th>Sample Technology</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Leaders tell employees the purpose, goals, priorities and requirements of a restructure</td>
<td>vs. Leaders tell employees the purpose, goals, priorities and requirements of a restructure and that provided these conditions are met, employees are also free to solve any other problems they identify</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Leaders ask employees their thoughts on the root cause of the problem</td>
<td>vs. Employees identify the root cause of the main problem</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Leaders research structures that would eliminate that root cause</td>
<td>vs. Employees brainstorm structures that would eliminate that root cause</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Leaders develop a new org chart and operating model and ask employees for feedback</td>
<td>vs. Employees develop a new org chart and operating model and ask leaders for feedback</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Leaders make adjustments to the org chart and operating model based on employee feedback, then present the adjustments to employees for more feedback (repeat until satisfied)</td>
<td>vs. Employees make adjustments to the org chart and operating model based on leader feedback, then present the adjustments to leaders for more feedback (repeat until satisfied)</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Leaders design governance to suit the new org chart and operating model</td>
<td>vs. Employees design governance to suit the new org chart and operating model</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Leaders look for systems that will better fit their new structure</td>
<td>vs. Employees suggest systems that will better fit their new structure</td>
<td></td>
</tr>
</tbody>
</table>

Source: Gartner (August 2021)
These are the two extremes, but this is a spectrum. The options in between are limitless. For example:

- Leaders and employees could define problems together.
- Leaders could present employees with multiple org chart and operating model solutions to choose from, or could require that employees come up with multiple options and highlight the pros and cons of each.
- Employees could design the org chart and operating model, but leaders withhold the right to design governance (or vice versa).

With all these options, how much should you let go? Gartner recommends that you move as far to the right of the co-creation spectrum as you’re comfortable doing. If that seems like a recipe for chaos, read the next section.

**Let Go With a “Who, When, How” Plan**

It’s true, the potential for chaos is very real at this stage: On the one hand, you don’t want to make a unilateral decision and then get feedback on what is really already a decision made. On the other hand, you also don’t want to involve everyone, all the time, or there will be too many decision makers to get it done.

The key here is to select:

- **The right people** (who)
- **At the right time** (when)
- **In the right way** (how)
To do that, follow this procedure:

1. **List process steps.** Loosely outline the steps of your solutioning process, as at the bottom of Figure 2.

2. **Compare process steps and stakeholder map.** Place your process steps side by side with your stakeholder map. For now, look at just the first step in your process and just at the stakeholders inside the marketing team.

3. **Select marketing stakeholders for inclusion.** Write down next to the first process step whom you’ll include from the marketing team. If your team is small, you could include everyone. If your team is large, don’t try to include everyone; instead, identify the most relevant individuals, ensuring you have representatives from every impacted team and from all levels within those teams.

4. **Determine how to include marketing stakeholders.** Still working on your first process step, consider each included individual’s expertise and personality through the lens of your restructure guidelines (purpose, goals, priorities, requirements). Let this guide your decision on how to include the person.

5. **Repeat No. 3 and No. 4 for marketing stakeholders.** Do the “who” and “how” again for all your solutioning process steps.

6. **Repeat No. 3 and No. 4 for non-marketing stakeholders.** Look again at your stakeholder map, focusing now on non-marketing stakeholders (executives and business partners). You should have notes on a suggested communication plan that you took while on your buy-in listening tour. Use your communication plan notes to guide where each non-marketing stakeholder should be included in your solutioning process, and how. If you’ve opted for a more employee-led co-creation process, it’s a good idea to get feedback from executives and business partners at the same time marketing leaders give their input. If you’ve opted for a more leader-led co-creation process, get executive and business partner input before soliciting employee input.

Selecting “who” and “when” is pretty straightforward, but “how” can vary a lot. The listening channels in Table 1 (above) are a starting point, and you might want to use the less resource-intensive channels for some people. But given the inherent intensity of designing a new structure, you’ll likely need at least several group meetings to brainstorm.
As your strategically designed team of co-creators works to develop restructure solutions, don’t forget to keep the people you didn’t involve informed. Otherwise your co-creation team can start to seem like a restructure cabal conspiring about whom to lay off. Trickle out “safe” details of the restructure as they’re finalized, together with information about the decision-making process. That way even those who didn’t provide input directly aren’t caught completely off guard when you proceed to Step 3.

**Step 3: Announce the Plan and Plan the Change**

One of the greatest benefits of co-creating your restructure solution with people at all levels is that it enables you to disperse responsibility for implementation as well. Top-down implementation, like top-down solution development, does not usually go well. Aside from being slow and riddled with failures, it places a great deal of stress on managers, who face real potential for burnout during a major restructure.

So, when your solution co-creation team finally has a final plan, you have three things to do:

1. Announce the plan to everyone
2. Field questions and concerns
3. Co-create the rollout plan

This is the fulcrum of your restructure process, so it should be a great big meeting with every impacted marketer. You could schedule it as one long session or, to give people time to digest, multiple. If your team is especially large, consider doing 1 and 2, then introducing 3 and splitting teams into breakout sessions, to return with ideas presented by a single spokesperson. Or do 1, then break out for 2 and 3. However you do it, make sure you do these three things in this order, to keep up the perception (and reality) that...
Announce the Plan
Have your solution development team prepare a presentation for this announcement. For the best optics, employees from all impacted teams and levels should present the portions they’re most familiar with. They should cover these points:

The Past
• A reminder of the problem the restructure is designed to address (i.e., that thing you sought buy-in for so long ago)
• An explanation of the purpose, goals, priorities and requirements outlined by the leadership team (i.e., design team guidelines)
• A thorough description of the collaborative solution-development process the team has been through (i.e., who, when, how)
• The alternatives that the solution development team considered and rejected (to demonstrate that the approved solution was not just some powerful person’s pet idea)

The Future
• What’s not changing
• What is changing
• Who the changes will affect
• Adaptations you’ll make to expectations (quality, quantity, deadlines) to create capacity for change adoption
• A description of what success will look like at the end
• Feedback channels you’ve set up to encourage everyone to express themselves about the change
• How you’re going to support them to make the change

What you should not include in your presentation is any reference to deadlines. It’s fine to have some in mind, but announcing them publicly is counterproductive: It suggests the team should feel “settled in” by a certain date. But feelings don’t work that way. And if your team members perceive their feelings to be in conflict with your expectations, they’re likely to stop giving you the feedback you’ll need to truly settle them in.

Instead — publicly — adopt an agile approach to implementation rollout, co-created (of course) with your team.
Field Questions and Concerns
This part of the meeting should be straightforward: Let team members ask questions, and answer them frankly. If your team asks about timelines at this stage, tell them what you have in mind, but reiterate that this is flexible and that in the next phase of the meeting, everyone will get to give input into implementation planning.

If negative feelings come up, don’t pander to them (the decision is made at this point), but also don’t silence them. Unbridled enthusiasm from management is one of the most unproductive features of top-down restructure communications. All they communicate is that leadership is out of touch with employees. Instead, listen, validate the concern and offer ideas for managing it.

Ideally, delegate responding to questions and concerns to your design team wherever possible. This not only maintains the optics of inclusion, it also lets all team members know that leaders are not the only ones with answers — their peers have them too. This is critical for minimizing the burden on managers during rollout in Step 4.

Co-Create the Rollout
Giving your team plenty of time to ask questions and express concerns also gives them plenty of time to think through the implications of the restructure for their personal workflows. Which is great, because that puts them in the right frame of mind for co-creating the rollout. In this part of the meeting, leaders should mostly listen. Ask your team:

1. Should we roll out gradually or all at once?
2. When should we begin implementing changes?
3. How should we measure success?

If you didn’t leave anyone out of your solution co-creation process, you could ask these questions as part of Step 2. But if you had to leave some impacted individuals out in Step 2, it’s very important to ask and listen now. You could still request that your solution co-creation team consider these questions a little bit so that they come to this discussion with some ideas in mind (especially if there are any constraints on timing). That will help everyone make quicker progress toward a plan.
Gradually or All at Once
Your team knows best how much personal change your restructure will create in their workflows, and how much they can handle at any given time. Naturally, whether your solution can be staged gradually depends on its size and complexity. If it’s small and simple, this may be a moot point. But if it’s not, and your team prefers to stage the rollout, ask them to tell you how they’d order the stages. Would they prefer to pilot the change initially with just one or two teams to iron out wrinkles before the change spreads? And so on.

When to Begin
Given the many, small, constant changes that employees now deal with on a daily basis, it’s in your best interest to allow your team to influence when rollout begins. They know best how to manage disruption to their workflow.

A staged change is easier to start right away. An all-at-once change might need some mental preparation. Either option can feel overwhelming if other changes are already in process or planned.

Some teams like to “batch” changes: If large, enterprisewide or other big changes are coming, a team restructure might as well happen at the same time. Especially when only some teams are being restructured, batching those changes with others that impact everyone can give the whole team a sense of camaraderie, of being in the same boat even though they’re navigating different changes. When nobody knows how to do their job anymore, the fear of falling behind or looking ignorant is diminished, and people are more likely to ask for help and to help others.

But other teams are strongly susceptible to change fatigue when changes are batched, and it matters how disruptive the various changes are. Because this can vary so much depending on the changes in play right now, the best policy is to just ask your team.

How to Measure Success
Remember how you didn’t mention deadlines in your presentation of the solution? Now’s the time to discuss tentative “target dates” (not “deadlines”), together with the measurement plan. Target dates are important to motivate people to try, and as long as they’re not communicated as “deadlines,” it should be clear that management is willing to flex for team needs. Whether your team opted for an all-at-once or staged rollout, ask them to work forward from their chosen start date to:

- Identify progress milestones that the team can celebrate
- Set a target date for each milestone
- Develop a set of metrics the team can use to measure when each milestone is reached
Co-created milestones with target dates and objective metrics clearly communicate to your team members that they have permission to make mistakes without penalty, at the same that they show them the challenge of change is not going to last forever.

“I’m being forced to restructure and I have a firm deadline and metrics from the top.”

Hard times. Chances are, though, the top didn’t tell you all the details of how to restructure. Which leaves room for you to involve your team in some empowering, accountability-building co-creation. And all restructures have constraints (see the “requirements” bullet in the “Develop Guidelines for Your Design Team” section above), so just be transparent with your team about yours, emphasizing what flexibility you do have. If you do this, your team should see that you’re trying to make a painful situation as painless as possible, which earns you cred. Cred brings cooperation, and cooperation brings better results.

**Step 4: Build Capability — Not Commitment — to Change**

Top-down restructures don’t just get decision making and implementation wrong. They also fundamentally botch communications. Typically, the strategy is to repeat the same message frequently in various channels, explain why change is being made and downplay negatives of the change to focus on positives.

Obviously such communications assume that senior leaders know best how to do employees’ jobs, which we already know is problematic. Less obviously, they also assume that if employees are simply committed to change, they can make it happen. This is patently false. The key to a successful restructure rollout is not commitment but capability. And if you’ve followed Steps 1 – 3 above, you’ve already been building commitment for months. So how do you now build capability? Provide two things:

1. **Practical support** like information, people connections and tools that help employees figure out how to navigate their new environment independently

2. **Psycho-emotional support** that builds employees’ confidence that they can figure this out for themselves

To do these two things, you’ll need to continue fostering open dialogue so that you and your team are able to co-create solution adjustments, governance, tools and networks for your new normal.
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Discuss
In Step 4, the goal is to advance change adoption as quickly and efficiently as possible. But remember the reality of a restructure from Figure 1 (the restructure process overview): In rollout, we discover what we couldn’t have foreseen and have to circle back to previous stages — on a smaller scale — to correct fatal design flaws. By keeping communication radically open in this stage, you speed up implementation not just by facilitating capability-building where your solution design is sound, but by enabling rapid identification and correction of design elements that turned out to be unsound.

This is why, in Step 3, we advised you to mention in your solution announcement presentation the adaptations you’ll make to expectations (quality, quantity, deadlines) to create capacity for change adoption. Not only will people do everything more slowly in a new structure, they will also need more time to talk to each other. A lot more time.

So, as soon as rollout begins, Gartner recommends setting up regular meetings for at least these three groups (assuming individuals already have regular check-ins with their supervisors):

1. **Peer discussions.** Tell individuals in the same or similar roles to set these up at the cadence they prefer. They should use this time to talk out how they need to do things differently, share what’s worked and what hasn’t — and yes, vent. No managers allowed in these meetings.

2. **Q&As with teams and their managers.** Have each manager set these up for their team. As the rollout progresses, managers should be talking with one another frequently to catch any cross-team complications (e.g., “Because the content team is now doing that, the analytics team is having trouble doing this”). These meetings provide a regular opportunity for teams to tell their managers when they’re having such a problem, and for managers to tell their teams when they’re causing a problem for others. Teams and managers can either solution together, or teams can take solutioning back down to the peer discussion groups.

3. **All-teams.** You set these up (less frequently than the others, of course). The goal of these meetings is to catch any cross-team challenges that haven’t been surfaced by managers, and to do a general wellness check. This is also a good time to check in on your milestones and associated metrics.
In all of these discussions, remember that your goal is not only to catch and solve problems, but to build self-confidence with psychological and emotional support. The more you allow employees to talk through their problems without manager instruction, the more they'll learn to think for themselves in their new environment. If they do that, it will quickly translate to a belief that they can do this, and that will lead them to actually do it more quickly.

Although managers should not provide scripts or directions in these meetings, it's very important that they listen closely in the ones they join. Specifically, they should listen for any indication that critical information, networks or skills are missing. Those are the signals that will tell you where governance, tools, and connections are needed.

**Govern**

Any time you change your org chart, operating model, roles or systems, you need to look again at your governance documentation (i.e., your policies, procedures, performance metrics, etc.). If your solution co-creation team was thorough, they should have already updated some of this. But as you work through the rollout, you will almost certainly discover that some things need adjustment.

Managers should make a special point of raising performance metrics with every direct report as the rollout proceeds, to ensure they have the opportunity to flag any metric they feel is no longer relevant or fair. For other governance adjustments, like policies or procedures, simply listen for problems in meetings. If you hear one, don’t just tell managers to adjust governance documentation. Instead, ask the teams that are having the problem to adjust the document themselves (subject to manager approval, of course) in their next peer discussion. As with your structure solution development process, asking the people who do the work to design governance will get you a better solution, faster.

**Equip**

Governance tells people what to focus on and how to use the structures (org chart, operating model, roles, systems) around them. Tools, on the other hand, help them use these things. They make executing easier, faster and (dare we say?) more enjoyable. They come in myriad forms, depending on the problem that needs to be solved. See Table 3 for examples.
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Table 3: Example Rollout Problems and Tools to Solve Them

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<thead>
<tr>
<th>Problems</th>
<th>Example Tools</th>
</tr>
</thead>
<tbody>
<tr>
<td>Team needs more real-time interaction during</td>
<td>Create new channels on your internal chat platform</td>
</tr>
<tr>
<td>implementation</td>
<td></td>
</tr>
<tr>
<td>Process is taking too much time</td>
<td>Create a template</td>
</tr>
<tr>
<td>Process is too complex</td>
<td>Distill it by building a scorecard, matrix, decision tree, etc.</td>
</tr>
<tr>
<td>Systems are burdensome with new processes</td>
<td>Redesign forms, or take them into Excel/PPT/etc. until a new system can be</td>
</tr>
<tr>
<td></td>
<td>contracted</td>
</tr>
<tr>
<td>Newly needed skills are missing</td>
<td>Take advantage of free vendor trainings or HR-led L&amp;D programs, or set up</td>
</tr>
<tr>
<td></td>
<td>your own team shadowing, peer coaching or other such programs</td>
</tr>
<tr>
<td>Team or individual is burned-out, tired</td>
<td>Boost psycho-emotional support through employee resource groups, fun team</td>
</tr>
<tr>
<td></td>
<td>outings, extra PTO, etc.</td>
</tr>
</tbody>
</table>

Source: Gartner (August 2021)

Wherever possible, empower your teams to create tools to solve their own execution problems. Where that’s not possible, connect them to resources and people that can help.

**Connect**

One of the terrible consequences of top-down restructures is that employees become hopelessly dependent on management for all their information, coaching and support needs. Yet in the middle of a restructure, managers have even less time to give. Which means employees have less support when they need more.

Gartner’s now-classic “Connector manager” research provides a very simple solution to this problem. Instead of relying on managers to supply everything their direct reports need, encourage both managers and non-managers to connect each other to people who can help. Is there a junior person on your team who’s been through a similar change before, or someone who seems to be handling it particularly well? Did a different department go through a similar restructure last year, such that their employees are now a treasury of knowledge (and maybe tools) for navigating these very changes? Perhaps some team member knows someone outside your organization who wouldn’t mind taking a call to explain how they overcame a challenge your team is now facing?

If you don’t know whom you could turn to, Communications and HR often do, because they support change rollouts all the time. Ask them to connect you, so that you can connect your team.
**Step 5: Keep an Eye on Change**

Most commonly, organizations measure change success using three metrics: completion of change objectives, positive employee attitudes about the change (i.e., commitment, not capability), and consistent implementation of changes. These metrics aren’t useless, but they aren’t very thorough or goal-oriented either. Let’s cover a better way to track your restructure’s progress.

**Metrics to Watch**

**Problem-Related Metrics**

Remember all the way back in Step 1 when you tried to convince people there was a big enough problem to warrant a restructure? Whatever that problem was — inefficiency, poor coordination, low quality or some as-yet-unobtained goal — hopefully you measured it, because the best thing you can do to prove your restructure’s success now is to show that those metrics improved.

If your problem was inefficiency, you might have tracked time and cost to complete various types of projects, days/hours spent waiting for bottlenecks to clear or time spent on rework. If it was lack of coordination, you might have numbers on how much work was duplicated across teams or evidence of inconsistent messaging. For low quality, maybe it’s social engagement scores or event drop-offs.

Whatever you used to make the case for a restructure, keep tracking the same things, or else you won’t know whether all the work you put into a restructure actually made any difference. (And neither will anybody else.)
**Implementation Progress Metrics**

These are the metrics you co-created with your team when you planned your rollout in Step 3. They should measure milestone attainment, so are highly dependent on your unique restructure solution. But they probably included metrics like “X% of the team is doing Y,” “P% of the team feels very confident doing Q,” and “A% of files have been transferred to B.”

Consider also using elements of Step 4 as happy indicators that people are getting more comfortable. For example, as things get easier, peer discussion meetings will naturally get shorter. Fewer discussion points will get brought up in team-manager Q&As. The team will express some positive threshold of satisfaction with new governance and tools. And so on. You might not be able to put a target date on these metrics, but they’re good milestones to watch out for anyway, as they’re things to celebrate.

**Team Wellness Metrics**

During restructures, employee productivity and attitudes toward work can take a nosedive, and sick leave, turnover and early retirement spike — especially for cost-driven changes and mergers. If you’ve followed Steps 1 – 4 in this guide, that’s less likely to happen to you. But it’s still wise to keep an eye on metrics like those.

Table 4 lists other common problems that can quickly escalate to major wellness issues during a restructure, with some examples of how you might hear them.

<table>
<thead>
<tr>
<th>Wellness Threats</th>
<th>What You Might Hear</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unclear roles</td>
<td>“Am I supposed to do that or is he?”</td>
</tr>
<tr>
<td></td>
<td>“I just don’t understand my job anymore.”</td>
</tr>
<tr>
<td>Compromised agility</td>
<td>“It takes so long that by the time I do it, it’s no longer relevant.”</td>
</tr>
<tr>
<td></td>
<td>“Nothing I try works.”</td>
</tr>
<tr>
<td>Loss of network</td>
<td>“I used to rely on [person], but now I can’t.”</td>
</tr>
<tr>
<td></td>
<td>“I don’t know who I’m supposed to go to anymore.”</td>
</tr>
<tr>
<td>Lack of direction</td>
<td>“What should my priorities be here?”</td>
</tr>
<tr>
<td></td>
<td>“What am I supposed to be focusing on?”</td>
</tr>
<tr>
<td>Ambiguous outcomes</td>
<td>“What do we do this for?”</td>
</tr>
<tr>
<td></td>
<td>“Why is this so important?”</td>
</tr>
<tr>
<td>Incompatible structures</td>
<td>“I’m supposed to do X but Y makes it impossible.”</td>
</tr>
<tr>
<td></td>
<td>“You said to do X but everyone’s still doing Y.”</td>
</tr>
</tbody>
</table>

Source: Gartner (August 2021)
If you miss the significance of statements like these and fail to respond, frustration, stress and burnout on your team will only increase. Consider as urgent red flags in any individual or team:

- Poor performance/work quality that endures even as other individuals/teams improve
- Appearing stressed all the time
- Frequently in a bad/negative mood
- Helping teammates less
- Supporting fewer nonessential projects
- Proposing fewer ideas
- Skipping check-ins, meetings, events
- Frequently working off-hours
- Not taking breaks
- Making poorer food/fitness choices

Clearly these are all signs that managers must watch for — which will increase managers’ own cognitive burden. So you watch your managers.

How to Collect the Data
There are three main ways:

1. **Systems data**: If you’ve got it, great. It’s a very efficient way to track problem-related and some implementation progress metrics.

2. **Manager conversations**: They’ll be happening anyway, so formalize data capture with a template, report or other form that managers can quickly and easily fill out after meetings and check-ins. This is critical for all team wellness metrics and some implementation progress metrics.

3. **Pulse surveys**: In Step 1 we advised against using surveys, but they’re a good idea here. Implementation is a long process and you need regular data to track change over time. Rollout might start off great, but then fall off a cliff. Use (anonymized) pulse surveys to supplement manager feedback on your team’s sense of progress, self-confidence and general wellness.
How to Present the Data

Tracking the above metrics isn’t very valuable if you get so busy that you don’t review them. But collating and presenting them is extra work many people will want to avoid during a busy restructure. Make it easy for yourself to keep an eye on these metrics by:

- **Delegating report generation.** Assign one member of your leadership (or marketing operations) team to aggregate and update these metrics on a regular (frequent) cadence. Gartner recommends weekly to start, reducing to monthly as people settle in.

- **Consolidating metrics.** Some of your restructure metrics (particularly problem-related ones) are probably already part of other reports. But it’s hard to remember to look for them there, so build a single report to keep all your change-related metrics in one easy-to-overview place.

- **Scheduling regular reviews.** Don’t just have your delegate send everybody an updated restructure report by email and trust that they’ll review it. They might not make time. Instead, schedule weekly (then monthly) reviews of the data for the leadership team. Meetings will also give managers the opportunity to provide additional commentary on any data they sent in.

When it comes to further sharing of the data beyond your leadership team, let Table 5 be your guide:

<table>
<thead>
<tr>
<th>Metrics</th>
<th>Present With</th>
<th>Present To</th>
<th>With the Goal of...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Problem-related</td>
<td>Pre-structure benchmarks</td>
<td>Whole marketing team (+ executives who care)</td>
<td>Showing improvement that keeps up team morale (+ executive buy-in)</td>
</tr>
<tr>
<td>Implementation progress</td>
<td>Current targets*</td>
<td>Whole marketing team (+ executives who care)</td>
<td>Showing progress that motivates the team to keep pushing forward</td>
</tr>
<tr>
<td>Team wellness</td>
<td>Time-lapse from day 1 of rollout</td>
<td>Marketing leadership team only (+ HR, if necessary)</td>
<td>Flagging individuals and teams for extra support</td>
</tr>
</tbody>
</table>

*Implementation progress targets may change if there have been major setbacks. If that’s the case for you, be sure to present the most recent targets, not the original ones, lest you inadvertently demotivate your team.

Source: Gartner (August 2021)
Finally, make sure you celebrate every win with fanfare and meaningful rewards. Because you co-created your restructure, your team will have worked as hard as you for every success. You all deserve recognition.

“This is too much work.”

This advice outlines Gartner’s top practices for designing, communicating and rolling out a restructure. There’s no doubt it’s more work than a top-down process — but it is also more likely to be a success that saves you time, money and frustration in the end. And the detail of the guidance above creates an exaggerated impression of the burden. To put it into proper perspective, here’s a summary of the five steps:

1. Identify and talk to your stakeholders
2. Choose people to collaborate with, and talk to them
3. Talk to more people about how to get started
4. Keep talking, adjusting as you go
5. Track your progress, adjusting as you go

It’s true: Talking to people is time-consuming. But provided you scope each stage well for your team size and the magnitude of your change, you can restructure your marketing organization without losing your sanity.
Actionable, objective insight

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  - Panel Discussion: Optimize Your Marketing Machine
  - Watch this complimentary webinar to find out how the best marketing executives conquer agile work management.

- **One-Page Framework**
  - 5-Step Framework to Navigate Marketing Transformation
  - Learn how our 5-step framework can help you identify your marketing team's capability, potential and action steps to navigate marketing transformation.

- **Content Hub**
  - 4 Steps to Building an Agile Marketing Organization
  - Get the 4-step guide to stay competitive among rapid marketplace shifts with a diverse and agile marketing team.

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