

Chapter 17: Two Teams, One CRM

Table Reference

Every table from this chapter, with what it's for and how to actually use it.

The Ownership Model: MarkOps vs. Sales Ops

Area	Owned By	MarkOps Role
CRM Platform Administration (security, licenses, sandboxes)	Sales Ops	Partner – MarkOps requests changes through the joint change process below
Marketing-Owned CRM Objects (Campaigns, Leads, MAP Sync)	MarkOps	Owner – Sales Ops consulted on any change touching shared fields
Forecast Categories & Opportunity Fields	Sales Ops	Consumer – MarkOps reports on stage data but does not define stage logic (Chapter 18)
Sales Engagement Tool (Outreach / Salesloft)	Sales Ops	Provides intent/MQL data feeds into sequences; does not administer the tool
Quota & Compensation Systems	Sales Ops / Finance	No role – kept fully separate from MQL/lead data to avoid comp disputes influencing scoring
Sales Dashboards & Pipeline Reporting	Sales Ops	Provides marketing-sourced metrics as inputs; does not own report build
Territory & Account Assignment Rules	Sales Ops	Partner – routing logic (Chapter 5) must reflect territory rules; see below for change process
Sales Ops Point of Contact		
Joint Review Cadence		e.g. Bi-weekly MarkOps <-> Sales Ops sync

Description: Defines who owns each shared CRM area (platform administration, marketing objects, forecast categories, and others) and what role MarkOps plays where it isn't the owner.

How to use it: Use as the reference document to settle “whose job is this” disputes before they happen – post it somewhere both teams can point to.

Territory & Account Assignment Governance

Change Trigger	Process	Owner	Data Impact to Manage
New Fiscal Year Territory Redesign	Sales Ops publishes new territory map 30 days before effective date; MarkOps updates routing rules in parallel	Sales Ops (build) / MarkOps (routing)	Re-run account-to-territory matching; do not touch attribution history on existing opps
Rep Departure / Coverage Gap	Sales Ops reassigns book of business; MarkOps updates lead owner defaults	Sales Ops	Open leads/opps reassigned same-day to avoid an unowned gap
Named Account Reassignment (single account)	Sales Ops approves; MarkOps updates account owner field and routing exceptions	Sales Ops	Check for in-flight MQLs/opportunities before reassigning
M&A / New Market Entry	Joint MarkOps + Sales Ops project; new territory and routing logic built from scratch	MarkOps + Sales Ops	New account matching logic; historical data mapping plan required

Description: Maps common territory-change triggers (fiscal year redesign, rep departure, named account reassignment) to the actual process, owner, and the data impact MarkOps needs to manage.

How to use it: Use as a runbook the next time territories change, so lead reassignment happens by defined process instead of ad hoc scrambling.

Joint CRM Change Management

Change Type	Sandbox Testing Required?	Approval Needed From	Communication Lead Time
New or Modified Field (shared object)	Yes	Both MarkOps and Sales Ops leads	5 business days
Workflow / Automation Rule Change	Yes	Owning team; FYI to the other	3 business days
Page Layout Change (shared	Recommended	Owning team	3 business days

Change Type	Sandbox Testing Required?	Approval Needed From	Communication Lead Time
object)			
Validation Rule Change	Yes	Both MarkOps and Sales Ops leads	5 business days
Integration / API Change	Yes	Both leads + IT/Security	10 business days

Description: Defines the real approval and testing requirements for different types of CRM changes, based on how much shared risk each type carries.

How to use it: Use as the literal change-management policy for your shared CRM, so a well-intentioned change doesn't break the other team's reports without warning.
