

P5

Marketing Operations, CRM & Analytics

Connect every marketing portfolio into one controlled, measurable operating system with Odoo as the source of truth.

THE ROLE IN ONE LINE

Data -> process -> automation -> measurement -> insight -> management decision

Opportunity Founding partner, MIIGO Digital Marketing Division	Application seat P5 Marketing Operations, CRM & Analytics
Location Pocharam, Hyderabad from the agreement stage	Basis Partnership with profit-share - not conventional employment

This guide explains the work itself: what you own, how the workflow operates, what outputs are expected, how the role connects to the other portfolios, and what capability you must demonstrate.

Commercial and legal terms are governed by the full Partner Invitation and, ultimately, the signed partnership agreement.

What this role is really responsible for

P5 is the operating backbone of the Digital Marketing Division. It defines how companies, contacts, campaign responses, leads and opportunities are represented in Odoo; how lifecycle stages work; how data moves between tools; how attribution is controlled; and how management receives reliable dashboards, scorecards and MIS.

WHY THIS ROLE MATTERS

Without clean lifecycle data and working attribution, the Division cannot know what is effective, cannot learn reliably and cannot sell its own process credibly as a service.

This is not the role

- The person who updates the CRM after everyone else finishes.
- A dashboard-only role disconnected from data collection and process design.
- An automation role that moves bad data faster.
- A reporting role that accepts conflicting numbers without reconciliation.

The working mindset

MENTAL MODEL

Data -> process -> automation -> measurement -> insight -> management decision

Common partner standard

- Own outcomes, not merely activities.
- Work from approved technical sources and resolve uncertainty before publishing, sending or reporting.
- Use AI to increase quality and speed, but keep human judgement and verification in the loop.
- Keep source files, data, links, decisions and reports traceable.
- Document repeatable workflows so another partner can continue them.
- Report poor results, blockers and errors early rather than hiding them.

Make Odoo the controlled source of truth

Objects P5 must govern

- Company and contact
- Lead and opportunity
- Campaign response and lead source
- Ownership and next action
- Product interest and geography
- Lead score and qualification
- Sales status, quotation and won/lost/nurture outcomes

Lifecycle design

RECOMMENDED LIFECYCLE

Raw -> Validated -> Qualified -> Contact-Ready -> Active -> Responded -> Sales Qualified -> Opportunity -> Quotation
-> Won / Lost / Nurture

Every stage needs entry criteria, exit criteria, mandatory fields, an accountable owner, allowed transitions and a defined follow-up rule.

Data governance

- Field and controlled-vocabulary standards
- Industry, geography and department standards
- Lead-source and product classification standards
- Campaign naming and ownership conventions
- Import schema, field mapping and source traceability
- Duplicate, stale-record, invalid-email and suppression control
- Orphan opportunity and missing-ownership detection

Remove manual re-entry without losing control

P5 should automate handoffs only after the objects, fields, stages and ownership rules are clear. Automation is a controlled bridge, not a substitute for process design.

Typical automation opportunities

- Lead import and validation handoff
- CRM creation and assignment
- Lifecycle-stage updates
- Campaign enrolment
- Follow-up task creation
- Sales notification
- Nurture entry
- Campaign response capture
- Reporting refresh

Cross-tool integration

- Lead generation / validation -> Odoo intake
- Email / LinkedIn / WhatsApp response -> CRM activity and stage update
- Website forms -> source-tagged lead/opportunity data
- Tracking links / QR -> campaign attribution
- CRM / analytics -> dashboards and MIS

AUTOMATION RULE

A fast automated workflow that creates duplicate, unowned or unattributed records is a process failure. P5 must design validation, exception handling and monitoring into the workflow.

Turn activity into management evidence

Measurement foundation

- Odoo CRM and pipeline data
- GA4 website/campaign analytics
- Google Search Console
- Google Tag Manager or equivalent event layer
- Behaviour analytics
- Email, LinkedIn, WhatsApp and campaign-platform data
- Controlled link and UTM tracking

Attribution P5 must define

- Original source
- First touch
- Last touch
- Assisted touch
- Campaign
- Revenue influence
- Consistent UTM taxonomy: source, medium, campaign, content, term

Reporting products

Weekly scorecard What happened, what changed, what improved, what is behind target, what is blocked and what happens next.	Monthly MIS Target vs actual, pipeline, attribution, portfolio performance, problems, corrective action and next-month plan.
Funnel analytics Raw -> validated -> contact-ready -> contacted -> responses -> qualified -> opportunities -> quotations -> wins.	Dashboards Lead generation, campaigns, website, CRM, pipeline and operations in a consistent management view.

P5 owns the operating discipline around the stack

Core environment

- Odoo - CRM and master operating data
- Make or n8n - recommended automation/orchestration layer where native integrations are insufficient
- GA4 / Search Console / GTM / Clarity - measurement and digital-behaviour evidence
- Excel / Power Query or equivalent - reconciliation, import preparation and data-quality work
- Campaign/outreach platforms - connected through source, stage and attribution rules rather than treated as standalone truth

Every paid tool should have

- Owner
- Purpose
- Workflow
- Cost/usage visibility
- Expected output
- Integration path
- Renewal decision
- Cost per useful output where practical

SOP library P5 should maintain

- CRM import
- CRM creation and assignment
- Deduplication
- Campaign naming
- UTM governance
- Lead assignment and sales handoff
- Dashboard and MIS
- Tool usage and access
- Data reconciliation and exception handling

P5 receives activity and returns trusted operating intelligence

P4 -> P5 Validated company/contact data enters Odoo through controlled schema, source and ownership rules.	P3 -> P5 Campaign sends, responses and qualified interest become lifecycle stages, activities, attribution and pipeline movement.
P2 -> P5 Website forms and conversion events become source-tagged CRM records and measurable actions.	P5 -> Management Scorecards, dashboards and MIS turn portfolio activity into decisions, priorities and corrective action.

P5 must challenge

- Conflicting numbers from two tools
- Campaign results with missing source or UTM
- Leads without owners or lifecycle stage
- Manual spreadsheets that become shadow CRM systems
- Definitions that change from one report to the next
- Automations with no failure monitoring or exception route

Who is likely to succeed in P5

Strong fit

- CRM architect who thinks in objects, stages, fields, ownership and transitions
- Data-governance operator who can diagnose duplicates and incomplete records
- Automation thinker who designs validation and exception handling
- Analyst who reconciles numbers before presenting them
- Person comfortable with attribution, funnel maths and management reporting
- Documentation-oriented operator who builds SOPs and repeatable controls

Weak fit

- Treats CRM as a contact list
- Builds dashboards without checking source definitions
- Automates before agreeing the data model
- Accepts tool totals that cannot be reconciled
- Creates reports that look good but cannot be traced to records
- Keeps critical logic in personal spreadsheets or memory

90-day ownership rhythm

- Days 1-7: understand current data, tools, stages, reports, owners and pain points.
- Days 8-30: define first controlled lifecycle, mandatory fields, import rules, source/UTM conventions and baseline dashboards.
- Days 31-60: remove manual re-entry from priority flows and connect campaign/website responses to CRM with validation.
- Days 61-90: deliver reliable weekly scorecards and monthly MIS, reconcile discrepancies and establish repeatable governance/SOPs.

How MIIGO will recognise real capability

The selection philosophy is evidence-led. Tool names, self-ratings and interview confidence are not enough. The strongest evidence is a candidate who can explain the method, execute a MIIGO-type task, accept correction and show how quality was verified.

What we look for

Capability Can you actually perform the work, not just describe it?	Accuracy Can you work with technical B2B information without introducing factual or commercial errors?
Systems thinking Can you turn work into a repeatable workflow rather than one-off manual effort?	Measurable output Can you connect activity to useful, traceable business outcomes?

Typical practical evidence

- Review two intentionally conflicting reports and identify the correct number.
- Explain the discrepancy and trace it to a broken definition, data flow or process.
- Propose the prevention system: source of truth, field/stage rule, automation or reconciliation control.
- Design a simple Odoo lifecycle with entry/exit criteria, mandatory fields and ownership.
- Show how campaign/website sources would be attributed and how the result appears in a dashboard/MIS.

Evidence that strengthens an application

- CRM architecture or migration examples.
- Lifecycle/stage design with clear definitions.
- Automation diagrams or working workflows with exception handling.
- Dashboards where metric definitions and source systems are documented.
- Data-cleaning/reconciliation work using Excel, Power Query or equivalent.
- MIS/scorecards showing how analysis led to a management decision.

NON-NEGOTIABLE

Fabricated facts, invented MIIGO claims, copied work, hidden errors, false evidence or deliberate reporting manipulation are incompatible with this role.

Understand the opportunity before you apply

4 founding seats The public application seats are P1, P2, P3+P4 and P5.	50% partner-group pool The partner group participates in 50% of Division net profit, divided by involvement/activity blocks.
No required capital MIIGO funds the entire Year-1 cost base.	Rs 10,000 monthly advance An advance against future profit-share, not a salary or wage.
Shared accommodation Provided for partners relocating to Pocharam, Hyderabad.	3-10 working-day trial Remote and unpaid before the agreement stage.

How to apply

- 01 Send your CV over WhatsApp and name the seat: P5 Marketing Operations, CRM & Analytics.
- 02 Add 3-4 lines on the most demanding piece of work you personally produced and why it was demanding.
- 03 Be ready to discuss your workflow, evidence, corrections, use of AI and the parts you can or cannot currently do.
- 04 Shortlisted candidates may be asked to complete role-relevant practical work before final block assignment.

APPLICATION CONTACT

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