

JB

Role Transformation Tracker: CMO Edition

Applying PURPOSE AUDIT™ to Marketing Leadership

The CMO Transformation Challenge

Marketing faces the most acute executive AI pressure

65% of marketing executives expect AI to dramatically transform their role within two years. But here's what makes marketing unique: the core activities that built CMO careers - content creation, campaign optimization, personalization, media buying - are exactly what AI does increasingly well.

This isn't happening to CTOs (they can become AI leaders) or CFOs (strategic judgment remains central). For CMOs, the transformation cuts closer to the bone. The work that defined your career is being absorbed by algorithms that never sleep, never second-guess, and scale infinitely.

For many marketing leaders, the work IS the identity. The campaign that won the award. The brand repositioning that changed perception. The creative instinct that knew what would resonate. AI doesn't eliminate these capabilities. But it changes their relative value. When AI can generate 10x the content options, the human value shifts to different things: curation, judgment, brand meaning, customer empathy at scale.

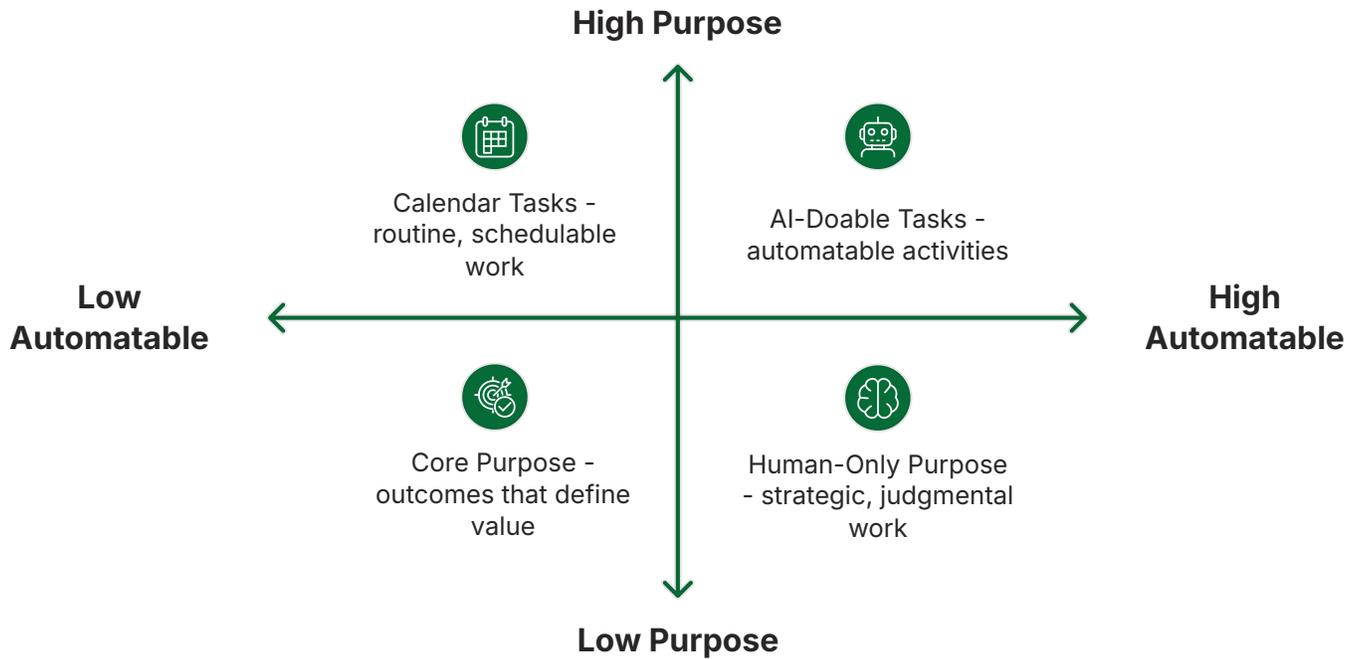
The uncomfortable question

If AI can create content, optimize media, and personalize at scale - what's the CMO for?

The answer isn't "nothing." But the answer requires honest assessment, not defensive positioning.

This worksheet helps you see clearly - what in YOUR CMO role is task execution, and what remains irreducibly human?

The PURPOSE AUDIT™ Framework



The core distinction between tasks and purpose becomes critical when artificial intelligence enters the equation. This framework helps marketing leaders separate execution from irreplaceable strategic value.

Task examples for CMOs

- Creating content briefs and managing production calendars
- Managing campaign execution and coordination
- Analyzing performance data and building dashboards
- A/B testing and conversion optimization
- Media planning and budget optimization
- Reporting on marketing metrics to leadership

Purpose examples for CMOs

- Defining brand meaning and strategic positioning
- Building customer empathy that shapes strategy
- Creative direction that knows what will resonate
- Cross-functional influence on product and experience
- Building marketing team culture and capability
- Ethical judgment about targeting and personalization

📌 **The CMO-specific trap:** Many CMOs conflate creative involvement with creative purpose. Being in the room when creative decisions happen isn't the same as providing irreplaceable creative judgment. This worksheet helps you distinguish.

Common CMO Tasks - Score Your Time Allocation

Part 1: Tasks 1-9

For each task below, estimate your time percentage and rate AI capability on a scale of 1-5, where 1 means AI can't do this at all, and 5 means AI does this as well as skilled humans. Be honest - this assessment only works if you acknowledge current AI capabilities, not what you wish them to be.

#	Task	Your Time %	AI Capability (1-5)
1	Content creation and production - Overseeing content development, reviewing drafts, managing content calendar	___%	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5
2	Campaign planning and execution - Developing campaign strategies, managing timelines, coordinating launches	___%	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5
3	Performance analytics and reporting - Dashboards, metrics review, campaign performance analysis	___%	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5
4	Media planning and buying oversight - Channel allocation, budget optimization, vendor management	___%	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5
5	Marketing automation management - Email workflows, nurture sequences, lead scoring oversight	___%	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5
6	Social media strategy and execution - Platform strategy, content scheduling, engagement monitoring	___%	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5
7	SEO/SEM optimization - Search strategy, keyword optimization, paid search management	___%	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5
8	Marketing technology stack management - Tool selection, integration, optimization	___%	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5
9	Agency and vendor management - Creative agencies, media partners, technology vendors	___%	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5

Common CMO Tasks - Score Your Time Allocation

Part 2: Tasks 10-18

Continue your assessment with the remaining common CMO tasks. Remember to account for all your time - the percentages should ultimately add up to approximately 100% of your working hours. If you find yourself significantly under or over 100%, revisit your estimates.

#	Task	Your Time %	AI Capability (1-5)
10	Customer research and insights - Surveys, focus groups, data analysis for customer understanding	___%	1 2 3 4 5
11	Competitive analysis - Market monitoring, competitor tracking, positioning analysis	___%	1 2 3 4 5
12	Lead generation and demand gen - Pipeline programs, lead flow optimization, conversion tracking	___%	1 2 3 4 5
13	Brand asset management - Style guides, templates, brand consistency enforcement	___%	1 2 3 4 5
14	Event marketing - Trade shows, webinars, conferences, owned events	___%	1 2 3 4 5
15	Product launch coordination - Go-to-market planning, launch execution, cross-functional alignment	___%	1 2 3 4 5
16	Marketing team management - Direct reports, performance management, resource allocation	___%	1 2 3 4 5
17	Budget management and ROI tracking - Marketing spend allocation, performance justification	___%	1 2 3 4 5
18	Internal marketing and communications - Executive updates, board presentations, cross-functional alignment	___%	1 2 3 4 5

Totals: Total Task Time: ___% | Average AI Capability Rating: ___

Irreducibly Human CMO Purposes

Part 1: Purposes 1-5

Now shift focus from tasks to purposes. Rate how central each purpose is to YOUR value as a marketing leader, where 1 means not central to your contribution and 5 means essential to your unique value. These are the activities that remain irreducibly human - they require judgment, empathy, cultural understanding, and meaning-making that AI cannot replicate.

#	Purpose	Centrality (1-5)	Your Notes
1	Brand meaning and positioning - Not the visual identity, but what the brand stands for. The strategic choices about meaning that shape everything else. AI can generate options; humans define meaning.	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5	
2	Creative direction and judgment - Knowing what will resonate before it's tested. The instinct that says "this, not that" when data doesn't differentiate. The taste that can't be algorithmized.	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5	
3	Customer empathy at strategic level - Understanding customers as humans, not data points. The insight that shapes product direction, not just messaging. Empathy that influences the organization.	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5	
4	Cross-functional influence - Getting product, sales, and executive teams to see through customer lens. Marketing leadership that shapes the organization, not just promotes it.	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5	
5	Cultural moment recognition - Knowing when timing is right, when cultural context creates opportunity, when silence is better than presence. Judgment that requires being human in culture.	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5	

Irreducibly Human CMO Purposes

Part 2: Purposes 6-10

Complete your purpose assessment with the remaining five dimensions of irreducibly human marketing leadership. These represent the highest-value contributions CMOs can make - the work that becomes more valuable, not less, in an AI-enabled world.

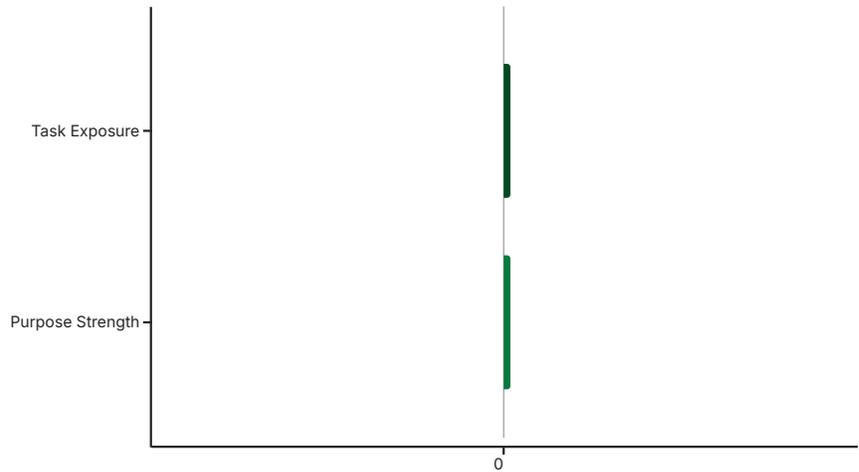
#	Purpose	Centrality (1-5)	Your Notes
6	Storytelling that creates meaning - Not content creation (AI does that), but the narrative architecture that makes a company's story coherent and compelling. The "why" behind the brand.	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5	
7	Crisis communication judgment - When things go wrong, the judgment about what to say, when to say it, how to say it. The human who speaks for the organization when stakes are highest.	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5	
8	Team culture and creative capability - Building an organization that produces great work. Developing people, creating environment, setting standards that attract and retain talent.	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5	
9	Executive influence and board presence - Representing the customer voice at the leadership table. Making marketing a strategic function, not a cost center. Earning and maintaining seat at the table.	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5	
10	Ethical marketing leadership - When targeting becomes manipulation, when personalization becomes invasion, when optimization undermines trust. The judgment that protects long-term brand for short-term gain.	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5	

Total Purpose Centrality Score: ___ / 50

Your CMO Task-to-Purpose Ratio

Calculate your exposure

Use your task and purpose scores to calculate your vulnerability to AI disruption and identify your strategic positioning.



Fill in your calculated scores on the worksheet, then visualize your positioning using a chart like this one.

Calculate Task Exposure

Multiply each task's time percentage by its AI capability rating, then sum all results. Divide by 100.

Task Exposure Score = ___

Calculate Purpose Strength

Add all your purpose centrality ratings together and divide by 10.

Purpose Strength

Score = ___

Express as Ratio

Write your scores as a ratio:

Task ___ : Purpose ___

CMO-Specific Interpretation

High Task + Low Purpose

Urgent danger zone - Marketing's task work is exactly what AI does well. This is the highest vulnerability pattern for CMOs.

High Task + High Purpose

Priority action needed - Strong purpose work buried under task volume. Radical task reduction required to protect purpose.

Low Task + High Purpose

Relatively strong position - Operating at strategic level. Focus on building AI orchestration capability.

Low Task + Low Purpose

Unclear positioning - May indicate role drift or misalignment. Define your value proposition urgently.

Worked Example: Elena, CMO

Elena's situation

Elena is CMO at a B2B SaaS company with 200 employees. She's been in marketing leadership for 14 years, CMO for 4. She thought she was "strategic" until she did the math.

When Elena completed her task inventory, she discovered that 90% of her time went to execution work - content oversight, campaign management, analytics, and demand generation. The AI capability ratings on her highest-time tasks averaged 4-5 out of 5.

"I spend 90% of my time on tasks, and the AI capability rating on my highest-time tasks is 4-5. My purpose work - the brand meaning, the creative judgment, the customer empathy - that's maybe 10% of my calendar. I'm the CMO, but I'm operating like a senior marketing manager."

Elena's task scores (top 5)

Task	Time %	AI Rating	Weighted
Content oversight	18%	5	0.90
Campaign execution	15%	4	0.60
Performance analytics	12%	5	0.60
Demand gen	10%	4	0.40
Team management	15%	2	0.30
Other tasks	20%	3.5	0.70

Total Task Time: 90% | Task Exposure: 3.5

Elena's purpose scores and realization

Purpose	Centrality
Brand meaning	3
Creative judgment	4
Customer empathy	4
Cross-functional influence	3
Team culture	4

Purpose Strength: 3.6

Elena's Ratio: Task 3.5 : Purpose 3.6

The insight

Elena's purpose centrality is decent (3.6 out of 5), but her purpose TIME allocation is only 10%. She has the capability for purpose work but isn't doing it. Her current operating mode makes her highly vulnerable even though her potential isn't.

This pattern is common among CMOs who rose through execution excellence. The skills that built the career become the prison that constrains it. Elena now faces a choice: restructure her role to match her potential, or accept that she's managing an increasingly automated function.

What Your Ratio Means for Marketing Leadership

Pattern 1: The Content Factory Manager

If your highest-time tasks are content oversight, campaign execution, and performance analytics - and you're rating AI capability at 4-5 on these - you're managing a function that AI is rapidly absorbing. The uncomfortable truth: you might be overqualified for increasingly automated work.

If this is you: The path forward isn't doing this work better. It's shifting to work AI can't do - brand meaning, creative judgment, customer empathy that shapes strategy. You need to redesign your role, not optimize your current one.

Pattern 2: The Brand Steward

Some CMOs operate primarily at brand and strategic level - they shape what the company means, not just how it's promoted. Their task time is lower because they've successfully delegated or eliminated execution work. Purpose time is higher because they focus on irreplaceable judgment.

If this is you: Your position is stronger than average, but CMO tenure is declining across the board regardless of operating level. Build the relationships and capabilities that make you irreplaceable. Document your strategic impact in ways that survive leadership transitions.

Pattern 3: The Identity Crisis CMO

This pattern shows high purpose capability but low purpose allocation - you COULD do strategic work, but you're not. Often this reflects organizational expectations (they hired a CMO but use you as a marketing manager) or personal comfort with tactical work (strategy is uncomfortable, execution is familiar).

If this is you: The question isn't capability - it's allocation. Can you shift your role to match your potential, or is the organization fundamentally using CMO as "senior marketing manager"? This may require direct negotiation with your CEO about role expectations and strategic contribution.

Your CMO Transformation Actions

If Task Exposure is HIGH

High task exposure means you're spending significant time on work that AI can increasingly handle. This isn't a comfortable realization, but it's actionable information.

Critical actions:

- Conduct a ruthless calendar audit - identify every content review, campaign coordination, and analytics task that could be delegated or automated
- Have a direct conversation with your CEO about CMO role expectations - are they looking for strategic leadership or marketing operations management?
- Research and pilot AI tools that could handle your current high-time tasks - not to eliminate your role, but to free capacity for purpose work
- Assess whether your current organization values and compensates for strategic CMO contribution or tactical execution



Your CMO Transformation Actions

If Purpose Strength is LOW

Low purpose strength suggests you're not spending significant time on irreducibly human marketing leadership - brand meaning, creative judgment, strategic customer empathy, cross-functional influence. This pattern makes you vulnerable regardless of AI capability.

Strategic repositioning:

- Request involvement in product strategy discussions, not just promotion of finished products - your customer insight should shape what gets built
- Build direct customer relationships that go beyond research data - spend time with customers in ways that generate strategic empathy
- Develop board presence and executive influence - make marketing perspective essential to strategic decisions
- Honestly evaluate whether your current role and organization allow for purpose-level contribution, or if they fundamentally need execution management

Shift 1: Product Involvement

Move from promoting products to shaping them through customer insight

Shift 2: Executive Presence

Build influence that makes marketing essential to strategy

Shift 3: Cultural Leadership

Develop capability that attracts and retains talent

- ❑ **The CMO-specific question:** Is your organization looking for a strategic CMO or a marketing operations leader? If the latter, and you're capable of the former, you may need to find that opportunity elsewhere. There's no shame in acknowledging organizational mismatch.

Continue Your Assessment

This is just the beginning

The Role Transformation Tracker gives you a snapshot of your current CMO positioning relative to AI disruption. But a complete career strategy requires deeper work across multiple dimensions - not just task-to-purpose ratio, but also financial runway, transition readiness, and AI fluency.

Tandem Coaching Partners has developed a comprehensive framework for marketing executives navigating AI-driven career transformation. Each tool builds on the others to create a complete picture of your strategic position and action plan.

Ready for deeper work?

Access the complete suite of assessment and planning tools designed specifically for marketing leaders facing AI disruption.

Visit tandemcoach.co to explore:

- Full PURPOSE AUDIT™
- RUNWAY READY™ Financial Assessment
- TRANSITION BRIDGE™ Career Planning
- AI FLUENCY MAP™

Companion resources



Article

CMO Career AI Disruption - Read the full analysis of why marketing leadership faces uniquely acute AI pressure and what it means for career strategy



Full PURPOSE AUDIT™

Complete the comprehensive assessment across all aspects of your marketing leadership role, not just the CMO-specific tasks



Strategic Planning

Work with Tandem coaches to develop your personal transformation strategy based on your assessment results

About This Resource

Tandem Coaching Partners

Tandem Coaching Partners specializes in executive career strategy for leaders navigating AI-driven transformation. We help C-suite executives - particularly CMOs, CFOs, and other functional leaders - understand their vulnerability to AI disruption and develop strategic responses.

Our approach combines ruthless honesty about AI capabilities with sophisticated career strategy. We don't offer false comfort or defensive positioning. We help executives see clearly, plan strategically, and act decisively.

This worksheet was created by:

- Alex, who provides strategic career analysis and frameworks
- Cherie, who brings identity-focused coaching to purpose work

Document information

Version: 1.0

Created: January 2026

Pairs with: CMO Career AI Disruption

Part of: PURPOSE AUDIT™ Framework Series

Contact:

Visit tandemcoach.co for additional resources, articles, and coaching services.

This resource is provided for educational purposes. All frameworks and methodologies are proprietary to Tandem Coaching Partners.

Your Next Steps

Complete Your Assessment

Finish scoring all tasks and purposes in this worksheet. Calculate your task-to-purpose ratio. Be ruthlessly honest - this only works if you acknowledge reality.

1

2

Identify Your Pattern

Review the CMO-specific interpretation section and identify which pattern most closely matches your situation.

Understanding your current position is essential to planning your next move.

3

Take Strategic Action

Based on your pattern, implement the recommended actions. If task exposure is high, start automation and delegation immediately. If purpose strength is low, begin strategic repositioning conversations.

4

Explore Deeper Assessment

Access the full PURPOSE AUDIT™ and companion frameworks at tandemcoach.co. Consider working with Tandem coaches to develop your comprehensive transformation strategy.

The marketing leadership landscape is changing faster than any other C-suite function. The question isn't whether AI will transform the CMO role - it's whether you'll transform your role before AI transforms it for you.

This worksheet gives you the clarity to make that choice consciously, not reactively. Use it well.