

# **FACILITATORS AND IMPEDIMENTS IN THE ADOPTION AND IMPLEMENTATION OF THE HUBSPOT MARKETING AUTOMATION SYSTEM**

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<p>Abstract</p> <p>Marketing automation is growing popularity among companies but it has not yet received great academic interest. Therefore, neither marketing automation systems have been studied thoroughly. Other preceding systems in marketing and sales, such as customer relationship management (CRM) and sales force automation (SFA) have however been explored comprehensively.</p> <p>The goal of this research is to increase the understanding of successful adoption and implementation of a marketing automation system. This attempt is attained by identifying what kinds of impediments and facilitators can occur in the adoption and implementation process of a marketing automation system. Furthermore, the perceived benefits of the implementation are recognised and differences between marketing automation system and other ICT systems are deliberated. This study is conducted as a case study, and action research was chosen as a relevant research strategy. The researcher was working in the case organisation which is a Finnish start-up in B2B software business. The company acquired a marketing automation software, HubSpot in March 2016.</p> <p>The main theoretical background consists of ICT adoption and implementation, and the concepts of marketing automation and content marketing. Research findings are constructed based on the framework of Honeycutt et al. (2005) who have identified impediments to the implementation of SFA. Thus, the same framework is adapted to marketing automation, and the impediments and facilitators found in this research are categorised in three phases: planning, communication and evaluation.</p> <p>All in all, this study extends the existing research on ICT implementation and marketing automation. Several similarities in the implementation of a marketing automation system and other ICT systems, such as a prerequisite for training, management support and adaptable organisation culture, are identified. There are also differences with the factors affecting the implementation, of which the lack of content is the most significant one. Therefore, this study reinforces previous research findings of the strong relationship between marketing automation and content marketing. The successfulness of the implementation process is also found to be more dependent on the organisational capabilities and overall performance of the sales and marketing activities than individual product features.</p>	
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## CONTENTS

1	INTRODUCTION .....	1
1.1	Introduction to the topic .....	1
1.2	Key concepts .....	2
1.3	Justification of the study .....	3
1.3.1	Objectives of the study and research questions .....	5
1.3.2	Introduction of data and research method .....	6
1.4	Structure of the study .....	6
2	ICT ADOPTION AND IMPLEMENTATION .....	8
2.1	Customer relationship management .....	9
2.2	Sales force automation .....	10
2.3	Marketing automation .....	11
2.3.1	Marketing and sales alignment .....	14
2.3.2	Content Marketing and social media .....	15
2.4	Impediments and facilitators in three stages .....	17
2.4.1	The planning .....	18
2.4.2	The communication .....	19
2.4.3	The evaluation .....	22
3	METHODOLOGY .....	26
3.1	Case company description .....	26
3.2	Case study and action research .....	27
3.3	Observation and semi-structured interviews .....	29
3.4	The role of the researcher .....	32
4	RESEARCH FINDINGS .....	33
4.1	The planning .....	33
4.1.1	The reasons behind the purchase decision .....	33
4.1.2	The goals for the implementation process .....	35
4.1.3	The risks, possible negative impacts and difficulties .....	35
4.2	The communication .....	37
4.2.1	Preliminary issues in the implementation process .....	37
4.2.2	Improvements in the implementation process .....	39
4.3	The evaluation .....	42
4.3.1	Social media activities and website traffic .....	43
4.3.2	Content creation, brand awareness and publicity .....	46
4.3.3	Lead generation and sales .....	48
4.3.4	The successfulness of the implementation process .....	51
4.4	Summary of research findings .....	55
4.4.1	The factors influencing the implementation .....	56
4.4.2	The outcomes of the implementation .....	59
5	DISCUSSION .....	61
5.1	Theoretical contributions .....	61
5.2	Managerial implications .....	63

5.3	Evaluation of the study .....	66
5.4	Suggestions for further research.....	68
REFERENCES.....		71
APPENDIXES.....		77
Appendix 1 Interview questions, part 1/3 .....		77
Appendix 2 Interview questions, part 2/3 .....		78
Appendix 3 Interview questions, part 3/3 .....		79

# 1 INTRODUCTION

## 1.1 Introduction to the topic

Marketing is one of the fields that has been dramatically affected by the emergence of Information age and the development of ICT technology. During the last decades, it has been going through profound changes with customer buying behaviour, communication methods (e.g. social media) and new technologies, such as sales and marketing automation.

Thanks to the Internet, customers have a better access to information and they can make more informed decisions. Customer have also gained more buying power, which indicates that companies must adapt new tactics to answer to their customers' needs and succeed in the competition. This logic has been understood first by B2C companies but B2B companies are also stepping in and leaving traditional methods and channels behind. Moreover, B2B marketers are faced with two major challenges: 1) how to extract and leverage customer and market knowledge properly, and 2) how to build strong interfaces between marketing and other functions (Wiersema 2013).

For a while, companies have been practicing some sort of customer relationship management (CRM) but what distinguishes 1990s from today, is that nowadays technology allows companies to manage one-to-one relationships with potentially huge numbers of customer (Payne & Frow 2006). Companies are adopting CRM software to support their sales and marketing, gather and storage customer data, and acquire, maintain and strengthen profitable customer relationships. Moreover, CRM system can involve or be integrated with sales force automation (SFA), marketing and customer support. (Foss, Stone & Ekinci 2008.)

The usage of SFA systems has become popular due to their valuable features, such as sales office automation, integration of the sales unit with other functions in the organization, and more effective management of the sales force (Barker, Gohmann, Guan & Faulds 2009). Overall, automation and software are found to be useful because they help to save time and resources, and improve the competitiveness of a company (Widmier, Jackson Jr & McCabe 2002). Regardless of the many benefits, huge amount of CRM and SFA implementations end in failure. This is due to various factors, such as the lack of management support, poor planning and lack of knowledge and research. (Honeycutt et al. 2005; Nguyen, Sherif & Newby 2007; Foss et al. 2008; Becker, Greve & Albers 2010.)

## 1.2 Key concepts

The key concepts in this study comprise marketing automation, content marketing, social media and lead generation. Marketing automation has evolved at the same time with CRM and SFA but it has become popular much later. Since the launch of the first marketing automation system, a great transformation has happened. Earlier systems were mainly focused on email marketing, whereas today, marketing automation systems are more complex and include various features, such as social media automation, A/B testing and landing page development (Marketing automation Insider 2015).

Nevertheless, email marketing is still considered to be one of the most useful features of marketing automation. Other beneficial features are e.g. analytics and reporting, campaign management, lead nurturing, integration capabilities, lead scoring and list segmentation. (Three Deep and Ascend2 2016.) There exists several marketing automation software providers but a few big players, such as HubSpot, Pardot, Marketo and Act-On dominate the industry (G2 Crowd 2016).

Marketing automation is closely connected to digital content marketing. Hollman and Rowley (2014, p. 20) define content marketing as follows: *“Digital content marketing is the activity associated with creating, communicating, distributing, and exchanging digital content that has value for customers, clients, partners, and the firm and its brands.”* Furthermore, content marketing is an inbound marketing technique, which means that valuable content should be created to help customers rather than promote company products or services. Valuable content is here referred as being useful, relevant, compelling and timely. (Holliman & Rowley 2014; Järvinen & Taiminen 2016.)

Without interesting and compelling content, there is not much use of marketing automation. In other words, if company’s target group does not consider content relevant, they do not want to consume it. Therefore, the usage of marketing automation should be started with defining buyer personas, which are fictional, generalized illustrations of company’s ideal customers (Vaughan 2015). Marketing automation has the same requirement as any other marketing activity. To be able to make any plans, company needs to first get to know its target group; who they are, what they are interested in and which channels they use.

In this research, the concept of inbound marketing is utilised to describe the marketing activities of the case company, such as blogs and social media. Inbound marketing is generally referred as an approach focused on attracting customers by publishing and/or sharing relevant and interesting content. The goal is that the potential customers find the company through its content, such as blogs, search engines and social media. (HubSpot 2017.) Social media is usually considered to be part of inbound marketing activities. Andzulis, Panagopoulos and Rapp (2012, p. 308) define social media as *“the technological component of the communication, transaction and relationship building functions of a business which leverages the network of customers and prospects to promote value co-*

*creation.*" Outbound marketing (or outbound sales) is the opposite of inbound marketing, and it can include e.g. trade shows, seminar series, email marketing to purchased lists, cold calling, outsourced telemarketing and advertising (HubSpot 2010).

Marketing automation is tightly connected with content marketing, but it can neither be separated from sales. It is seen to be useful in generating leads and shortening sales cycles with quicker response time (G2 Crowd 2016). Nowadays, marketing automation software often embraces sales automation and can be integrated with CRM. The combination of marketing and sales has attracted interest also in the academic literature as several papers stress out the importance of aligning marketing and sales (e.g. Rouziès et al. 2005; Matthyssens & Oliva 2006). For instance, Järvinen and Taiminen (2016) state that content marketing cannot be successfully integrated to B2B selling process if marketing and sales do not cooperate.

Often the lead generation and handoff process integrate marketing and sales in B2B companies (Singh & Chanda 2014; Matthyssens & Oliva 2006). Lead generation can be described as an process of identifying potential customers. It can be executed in several ways, such as tracking a visitor on a website and offering material to be downloaded or having a blog to create interest towards the company or its new products. (Singh & Chanda 2014.) Generated leads may not be ready to be contacted immediately, so they can be nurtured to build the relationship by creating trust. Järvinen and Taiminen (2016) define nurturing as an iterative process in which marketing leads are targeted with personalized "nurturing campaigns" and in return, marketers learn more about the leads. Nurturing often means attracting, educating and engaging leads with compelling content and encouraging them to become company's customers. Moreover, lead nurturing can include several emails comprising relevant content and promotional giveaways. When the lead becomes qualified, sales can make the contact (Singh & Chanda 2014).

A definition for a qualified lead can vary in different organizations but it often includes that it has been identified where the lead is in the buying cycle, the company has a budget for the purchase at hand and intention to buy. It is important that leads are qualified because otherwise it will be waste of time to focus on them. (Matthyssens & Oliva 2006.) In many cases, the quality of the leads is contingent to the relevance and attractiveness of the content for the company's target group (Singh & Chanda 2014).

### **1.3 Justification of the study**

Marketing automation is an interesting topic as the concept is rather new and it has not yet received great academic interest. However, a few noteworthy studies have been conducted. Heimbach, Kostyra and Hinz (2015) examined marketing automation in their paper and identified general framework for marketing automation. Whereas, Järvinen and Taiminen (2016) stressed B2B perspective to

marketing automation and explored ways in which content marketing strategies may be combined with B2B selling processes via marketing automation and the benefits and challenges of such an approach.

Literature on marketing automation systems is scarce. Furthermore, the adoption and implementation of a marketing automation system has not yet been explored with this type of data that is gathered during a long-time period. In many previous studies on ICT adoption and implementation, it has only been forecasted what happens after the adoption and how the implementation may succeed. Therefore, one of the key advantages of this research and the research time being quite extensive, is the opportunity to identify the outcomes and perceived benefits of the adoption and implementation. Accordingly, it can be deduced if the implementation of the marketing automation system has been successful in this case and if it has achieved anticipated outcomes.

A significant amount of academic research has been devoted to other automation systems relating to sales and marketing, such as customer relationship management (CRM) and sales force automation (SFA). Moreover, factors leading to the success or failure of the adoption and implementation of a CRM and SFA system have been examined thoroughly. This study brings more insight to ICT adoption and implementation in general, and extends the existing research. Based on this study, it can be recognised how does the adoption and implementation of a marketing automation system differ from other ICT systems, such as CRM or SFA. Furthermore, it is interesting to investigate if the factors leading to the success or failure of the implementation, identified in preceding ICT adoption research, have similarities with the factors identified in this study.

This study examines the adoption and implementation of a marketing automation system in a B2B start-up company whose product offering focus on recruitment software. Therefore, the case company determines this study in two ways: it gives this research a B2B context and the emphasis on small businesses, more specifically on start-ups.

*“A start-up is as a temporary organization that seeks a scalable, repeatable, and profitable business model, and therefore aims to grow.” (Blank & Dorf 2012, p. 2)*

Start-ups are an interesting object for a study for a couple of reasons. Firstly, even though it is self-evident that all businesses can benefit from ICT technology, it is particularly beneficial for small companies with limited resources. Start-up companies operate in uncertainty and are constantly faced with challenges (Bosch, Olsson, Björk & Ljungblad 2013). Taking advantage of technology and automation can help them to be agile and succeed against bigger organizations.

Secondly, the adoption and implementation of ICT technology has been studied most in medium and large businesses. There are studies concentrating on small businesses as well but there is still a need for more research on small companies in the early stage of their operation. This is important because the implementation process can vary between established businesses and early-stage companies. For example, an early-stage company adopting a CRM system can start the process from the scratch because it does not have a massive data storage



that needs to be imported to a new system. Whereas, the implementation of new software in a big company can be a massive operation which requires various resources and integrations.

The case company was selected as being the workplace of the author of this thesis. In the company, she is responsible for content marketing and implementation of CRM and marketing automation systems. The case company acquired HubSpot marketing automation and CRM software in March 2016 but the implementation process started officially in May when the author of this thesis started to work for the company.

The empiric study in this study focuses merely on marketing automation, not on CRM. There are two underlying reasons for this decision. First, the adoption and implementation of CRM has already been explored thoroughly during the last decades, whereas marketing automation has not yet received as much attention in the academic literature. Second, the case company purchased CRM system to support marketing automation, not the other way around. Yet, the implementation of CRM and marketing automation systems cannot be totally separated from each other as they were conducted at the same time and they are integrated together.

Järvinen and Taiminen (2016) suggested that future research could explore how marketing automation can be harnessed to create and share content for other key objectives of content marketing than lead generation and sales (e.g. promoting brand awareness and engagement). This study contributes to this suggestion as the case company aims to utilize marketing automation not only to benefit sales directly but also to create brand awareness through social media. Moreover, Järvinen and Taiminen (2016) highlighted the importance of future research on the role of social media in B2B content marketing and how much social media activities can be automated with new technologies. This study explores how the case company uses marketing automation system to automate its social media activities.

Heimbach et al. (2015) proposed that future studies could address customer reactions to marketing automation activities. This study focuses on the factors that affect the adoption and implementation of a marketing automation system but also on the outcomes of the implementation. Target audiences' reactions to the marketing automation activities play an important role in evaluating the success of the implementation.

### **1.3.1 Objectives of the study and research questions**

The purpose of this thesis is to increase the understanding of successful adoption and implementation of a marketing automation system. This goal is supported by an attempt to identify what kinds of impediments and facilitators can occur in the adoption and implementation of a marketing automation system.

Therefore, the primary research question is:

How a start-up firm can implement a marketing automation system successfully?

This primary research problem is supported by three additional research questions:

1. What kinds of impediments and facilitators can occur in the adoption and implementation of a marketing automation system?
2. What are the perceived benefits of implementing a marketing automation system?
3. How does the adoption and implementation of a marketing automation system differ from other ICT systems?

These research questions above are formed based on the literature review and initial research on ICT adoption and implementation. This research includes literature on CRM, SFA and marketing automation.

### **1.3.2 Introduction of data and research method**

In this case study, the empirical data was collected during 10 months (05/01/2016 - 02/28/2017). A qualitative research approach was adopted using one-to-one, in-depth semi-structured interviews with employees of the case company. Selected employees work full-time in positions related to marketing, sales, customer support and product development. The data includes 18 interviews in total and they were arranged in three phases in August 2016, December 2016 and February 2017. Therefore, each employee was interviewed one to three times depending of her/his working period in the company.

In addition, the data is collected by observing the everyday work inside the company, mostly within marketing and sales functions. The author of this thesis has a key role in the implementation of the marketing automation system, hence, her work affects this study heavily. Consequently, this study follows an action research method, which falls within the category of qualitative research whose goal is to increase understanding of a question, problem or issue. Furthermore, action research focuses on understanding how things are happening, rather than purely on what is happening (Stringer 2007, p. 19). The focus is on practical problem solving, and the perspectives and responses of key stakeholders act as an integral part in the research process (Stringer 2007, p. 19; Hearn, Foth & Gray 2009).

## **1.4 Structure of the study**

This study consists of five main chapters, which include introduction, literature review, methodology, research findings and discussion section. References and appendixes are presented in the end.

Literature review comprises information and communication technology adoption and implementation (chapter 2; 2.1 & 2.2) concerning Customer relationship management (CRM) and Sales force automation (SFA). Impediments and facilitators to the adoption and implementation of these systems are categorised in three phases: planning, communication and evaluation, and are presented in chapter 2.4. Furthermore, the impediments and facilitators to the adoption and implementation of CRM and SFA are gathered to two comprehensive tables.

The literature review comprises also the chapter 2.3 in which the concept of marketing automation is explored further. This includes inter alia the overall framework and its process. Also, the concepts of content marketing, social media and the alignment between marketing and sales are introduced. After the literature review, data and research method are presented in chapter 3. Additionally, this chapter comprises the description of the case company and the role of the researcher.

Theoretical framework of this study is derived from an article 'Impediments to sales force automation' presented by Honeycutt et al. (2015). This framework exhibited in the literature review, is adapted to the concept of marketing automation and examined in chapter 4. Thus, by following the framework, the research findings are categorised based on three phases: planning, communication and evaluation. Summary of the research findings are presented in the end of chapter 4. Key findings are divided into two subchapters, and they include the factors influencing the implementation and the outcomes of the implementation.

The discussion section (chapter 5) includes theoretical contributions, managerial implications, evaluation of the study and suggestions for further research. Lastly, the study is evaluated, its limitations pondered and relevant suggestions for future research are presented. The references and three appendixes (interviews 1, interviews 2 and interviews 3) complete this study.

## 2 ICT ADOPTION AND IMPLEMENTATION

The emergence and advancement of information and communication technology (ICT) has had an enormous effect on companies' ability to collect, analyse, and spread information (Duh, Chow & Chen 2006). Therefore, the adoption and implementation of ICT technologies have attained great popularity among researchers (Duh et al. 2006; Carroll & Wagar 2010).

Following Bouwman, Van den Hooff & Van de Wijngaert (2005, p. 10), the adoption of ICT technology is in this study defined as *"the phase of investigation, research, consideration and decision making in order to introduce a new innovation in the organization"*. Overall, the adoption phase can be understood as a company's decision making process which includes need defining, information search, comparison of alternatives and the final choice. One important part of the adoption is potential users' decision of if they will use the system or not.

Bouwman et al. (2005, p. 10) define implementation as *"the phase of internal strategy formation, project definitions and activities in which the adopted application is introduced within the organization, with the aim of removing reservations and stimulating the optimum use of the application"*. Implementation can be seen to follow the adoption phase and precede the phase that covers the (routine) usage of the technology. Implementation can also lead to the rejection of the technology. Moreover, implementation is an issue that should be taken seriously since considerable part of technology implementations fail or get completely cancelled.

The implementation of new technological systems has an influence on the way the organization and organizational processes are formed. Simultaneously changes in the organization necessitate new technologies. Since the implementation of new systems leads to organizational changes, ICT is often regarded as a 'technological miracle' that solves all sorts of organizational problems. However, not all ICT implementation projects end up going according to the plan or are successful whatsoever. In many cases implemented technologies lead to unhoped or unexpected changes in the company. Still, implementation of a technology may offer more possibilities than anticipated and match the needs of an organization that were earlier unknown. (Bouwman et al. 2005, p. 5.)

Various factors have been recognized to affect the adoption and implementation of a technology. Duh et al. (2006) recognized in their study that the most common reasons why software implementations failed were, lack of prior planning, systems inflexibility, and lack of integration with existing systems. Furthermore, Premkumar (2003) included the following factors in his research model: perceived usefulness, compatibility, cost, and ease of use. Moreover, it is notable that same factors can act as facilitators and impediments. Cost, for instance, can affect the adoption either positively or negatively.

Traditional research in the implementation of information and communication technologies and systems has merely focused on bigger companies but there exist also studies that explore the uniqueness of small

businesses in this area (Premkumar 2003; Carroll & Wagar 2010). According to Carroll and Wagar (2010), more novel firms are more likely to use information technology than bigger firms. Besides, Premkumar (2003) found out in his study that the reason why some small businesses adopt new technologies is that it has become strategic obligation for surviving in the business. Notwithstanding, several studies indicate that there is a difference between the implementation of ICT in big and small companies. Small companies can be nimbler in the implementation of new technologies since they do not need to confront as much resistance to change as big corporations have to. Support from top management is vital for the success of an implementation in all organisations. However, in smaller companies the owner of the business is usually the primary decision maker so his commitment to the implementation is extremely important. If he is not dedicated or perceives the technology narrowly, it may not succeed. Furthermore, ease of use is especially important for small businesses since they do not necessarily have required IT knowledge or a possibility to train their employees.

According to Light (2005), implementation can also vary with different types of technologies. One distinguishing factor is, if a software is packed or not. There exist also positive and negative aspects in packaged software compared to tailored systems. Packaged software can be implemented faster but at the same time, if the system does not offer everything needed, there may not be a possibility to change it or the modifications may take a long time. On the one hand, it is beneficial that package system decreases the need to have a IT knowledge and resource inside the company to be allocated to modify the system, but on the other hand, standardization may change the way company operates. Moreover, package system may have worked for some companies in the past but it does not guarantee that it will work for other companies with dissimilar needs.

## **2.1 Customer relationship management**

The significance of customer relationship management (CRM) has grown rapidly in a few decades. Companies are investing huge amounts in implementing CRM strategies and tools but at the same time, a substantial amount of CRM projects tends to end in failure. (Nguyen et al. 2007; Foss et al. 2008; Becker, Greve & Albers 2009; Becker et al. 2010.) One reason why CRM projects often fail is that CRM is viewed too narrowly (Foss et al. 2008).

The definition of CRM has been lacking a consensus. Often CRM is defined to be only about the implementation of a specific technology solution project or integrated series of customer-oriented technology solutions (Payne & Frow 2006). In addition to technology perspective, CRM can be regarded as a process, strategy, philosophy and capability. Zablah and Bellenger (2004, p. 480) stress the process perspective and suggest that CRM is best conceptualized as *“an ongoing process that involves the development and leveraging of market intelligence for the purpose of building and maintaining a profit-maximizing portfolio of customer*

*relationships.” Furthermore, Payne and Frow (2006, p. 168) highlight more strategic and holistic approach to CRM and define it as follows: “CRM is a strategic approach that is concerned with creating improved shareholder value through the development of appropriate relationships with key customers and customer segments.”*

The definition of CRM system can be detached from the definition of CRM. Foss et al. (2008) state that CRM system is a technology-based business management tool that is an important part of a CRM strategy. CRM systems utilize customer knowledge to nurture, preserve and reinforce profitable relationships with customers. Moreover, customer information is gathered to segment customers, determine how to handle unprofitable customers and customize products and services, and marketing and communication measures.

It is no wonder that CRM systems have become so important for companies since they comprise several benefits (Nguyen et al. 2007; Becker et al. 2009; Becker et al. 2010). According to Nguyen et al. (2007) a CRM system helps to track customers’ interactions with the organization, gather that information into one place and utilize it to create profound customer relationships. The usage of the CRM system can also increase customer loyalty, enhance customer service, improve organizational learning and foster marketing automation (Nguyen et al. 2007; Becker et al. 2009; Becker et al. 2010). Several industries can benefit from CRM but it is still more important for some companies than others. For companies that have close contact with their customers, it is highly valuable to have a CRM system, whereas, for companies that are farther away from their end customers, CRM implementation is recommendable but not mandatory. (Nguyen et al. 2007.)

Adopting a CRM system changes the way company works with its customers and necessitates that employees are open to learn new methods (Bohling et al. 2006; Foss et al. 2008). Before implementing a CRM system, companies need to assess how CRM fits into their business strategy, evaluate its current CRM capabilities, and make it clear what are the reasons why the system is needed and for what purpose it is adopted (Nguyen et al. 2007).

Moreover, CRM implementation is most effective when CRM strategy is linked to the overall business strategy (Bohling et al. 2006). Companies’ CRM strategies focus on varied functions such as the acquisition, maintenance, and retention of customers, and priorities between these functions vary. Therefore, companies can benefit from tailoring their implementation effort to the needs of these major functions. (Becker et al. 2010.)

## **2.2 Sales force automation**

Sales force automation exploits information technology to support and enhance the efficiency of a sales function and sales-related activities (Honeycutt et al. 2005; Buttle, Ang & Iriana 2006). SFA can be used to enhance various tasks like contact management, scheduling, creating sales plans, forecasting, finding prospects, making sales presentations, and retrieving information of products (Widmier et

al. 2002). In addition, SFA can be seen to support customer relationship management strategies (Speier & Venkatesh 2002).

Widmier et al. (2002) found in their study that SFA is especially useful in contact management, generating proposals and scheduling. Automated sales plans, geographic sales route planning, and qualifying the customer were not seen as important. Nevertheless, sales force automation, including customer relationship management technologies can increase organization's knowledge about its customers (Buehrer, Senecal & Pullins 2005).

Sales force automation (SFA), communication technology, and customer relationship management (CRM) can make the selling process more effective and reduce the amount of work or the number of sales representatives (Widmier et al. 2002). Furthermore, implementation of SFA can lead to hard outcomes, such as shorter sales cycles, improved customer relations, improved salesperson productivity, precise reporting, augmented sales revenue, more closing opportunities and enhanced cost-effectiveness. Softer outcomes are e.g. less rework, more timely information and better quality management reports. (Buttle et al. 2006.)

SFA adoption has a deep impact on the sales force, the way it operates, and the design and strategy of the whole organization (Honeycutt et al. 2005). According to Parthasarathy & Sohi (1997), the decision to adopt a sales force automation system needs to be made carefully since setting up will take time and keeping the system up to date consumes financial and human resources. Furthermore, the decision can be problematic since it is not easy to measure most of the benefits of the SFA system and evaluate the gains in the long term.

The adoption of SFA system contains two stages: (1) an organization needs to make a decision to adopt a SFA system and (2) the individual salespeople within the organization have to adopt the system. To be able to complete the second stage, the first stage needs to be completed. Parthasarathy and Sohi (1997) have defined this phenomenon as "dual adoption". In the second stage, it is extremely important that individual salespersons learn to use the system properly and change their working methods to take full advantage of it. Often some salespersons are more prepared to make changes than others who can resist the new system. Therefore, it is beneficial to identify the attitudes different employees have towards new system and changes it requires.

## **2.3 Marketing automation**

According to Heimbach, Kostyra & Hinz (2015), marketing automation is often associated with customer relationship management, email marketing, database marketing, digital marketing, direct marketing and dialog marketing. These concepts embrace some common features with marketing automation but they are not fully consistent. Marketing automation combines several disciplines, uses various data sources and takes different channels (e.g. website, mobile phone,

email) into account. At the same time, it streamlines email marketing and direct marketing by automating their processes.

While B2B marketers have a possibility to treat their customers personally and give them customized offers, B2C marketers often lack this opportunity. Without marketing automation, it is costly to personalize content for B2C customers, and in many cases, it may be entirely impossible. Furthermore, marketing automation enables B2C marketers to be more personal without overly consuming their financial and human resources. The usage of marketing automation system can also lead to enhanced conversion rate, cross- and up-selling and retention rate. (Heimbach et al. 2015.)

Marketing automation is based on an idea of following customers' actions. Therefore, it is all about customer behaviour and data. When a customer makes a move, a certain marketing action follows. To be able to understand the concept of marketing automation and what it can mean, Heimbach et al. (2015, p. 130) uses the following example:

*"A customer may have bought cinema tickets for a romantic comedy, which features a very famous actor duo. Based on this purchase history and gender, filed in the account information (in this case: female), a newsletter may be triggered as soon as a new movie is released featuring the male actor in a new film."*

The advantage of having a marketing automation system lies in the automation. One company may have thousands of customers, website visitors, users and triggers, and if every single action was implemented manually one by one, it would be time-consuming, inefficient, and extremely difficult to manage. On the contrary, when certain rules are set, a marketing automation system does the actions on behalf of the company. (Heimbach et al. 2015.) However, it is up to the company to set up these rules which signifies that marketing automation schemes are as clever as their users (Järvinen & Taiminen 2016).

A company can for example determine that when a website visitor downloads an infographic (and gives her contact information in return), she subscribes to receiving a newsletter. The newsletter (customized object) will be automatically sent to her via email (medium) without the company needing to do it manually. This example process is based on current information (behaviour on website) but triggers can also be due to historical data (stored information) and learning from customers' behaviour. This process is visualized in Figure 1.



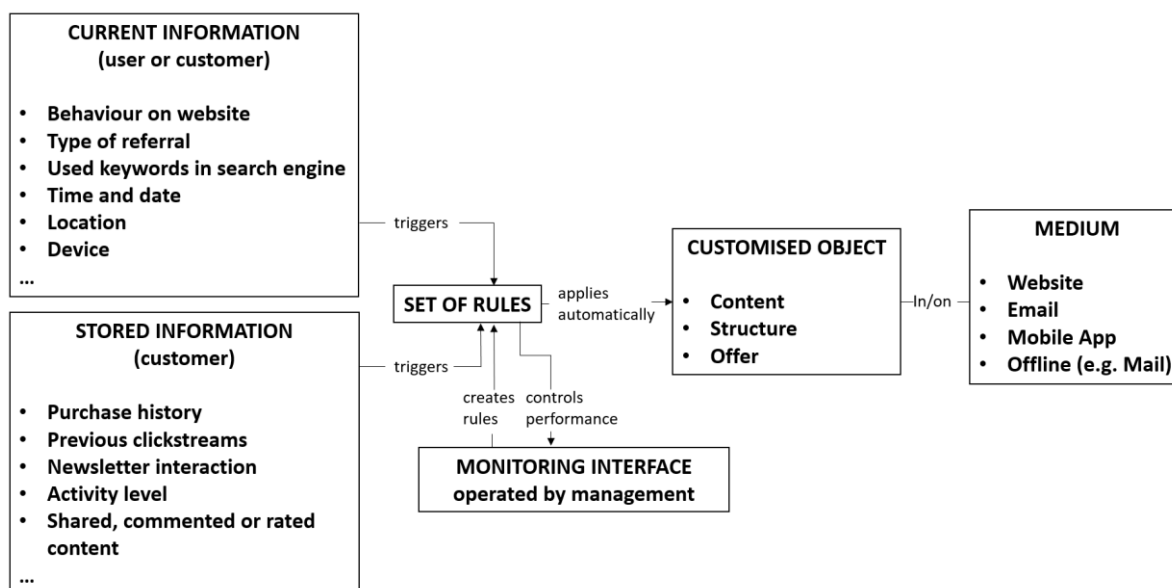


Figure 1 The general process of marketing automation (adapted from Heimbach et al. 2015)

Continuing the previous example and adapting a marketing automation process, presented by Järvinen and Taiminen (2016), a marketing qualified lead who has downloaded the infographic, starts to receive a company's newsletter that contains, among other things, blog posts. If the lead clicks on one of the links in the newsletter, she is directed to the website where the blog post is located. Based on this act, the automation software tracks the lead's navigation path, generating a more comprehensive picture of what the lead is interested in. Therefore, this data can be used to send better-targeted information and respond to the specific needs of these leads. This process may be repeated numerous times to gather as much information as needed to identify what the lead is interested in and how potential customer she could be for the company. When the lead is nurtured enough, she can be asked whether she would like to be contacted by the sales team. If she says yes, she becomes a sales qualified lead and sales persons can contact him.

It is noteworthy that not all marketing automation activities are based on customers' actions (e.g. automating social media publishing) or rest upon optimization (e.g. a welcome email for new users). Still, these actions are useful as they can improve customer experience and reduce costs by making marketing more efficient. (Heimbach et al. 2015.)

Marketing automation system functions in different stages of a marketing and sales funnel (Figure 2). It is essential to recognize the stage in which the contact is, because relevant content can be targeted and suitable actions executed based on that stage. Moreover, it is noteworthy that the stage is not stable but a contact can move backward and forward in the funnel over time. (Järvinen & Taiminen 2016.)

According to Heimbach et al. (2015), there are three main necessities for utilizing marketing automation. First, a data storage is needed to gather user and

customer data efficiently into one accessible place. Second, there is a need for a software that allows its users to create rules and execute them. Often these two requirements meet in one system and multiple software are not needed. Third requirement is that the marketing automation system has an intuitive user interface and/or the user of it has an expertise in computer science and marketing. Moreover, because marketing automation combines consumer psychology, marketing, and information systems, knowledge of all these fields is beneficial for its users.

This research is focused on increasing the knowledge of how a marketing automation system can be implemented successfully. This attempt is supported by identifying the impediments and facilitators in the adoption and implementation process. The framework 'Impediments to the adoption and implementation of a SFA system' (Figure 3) presented by Honeycutt et al. (2005) is adapted to this research. The impediments and facilitators to the adoption and implementation of a marketing automation system are categorised based on the three phases introduced in the original framework: 1) the planning, 2) the communication and 3) the evaluation.

### **2.3.1 Marketing and sales alignment**

Rouziès et al. (2005) argue that the increasing competitiveness in the business environment makes it crucially important to improve the interaction between marketing and sales. Aligning these two functions is vital for all companies but especially important when the customer concentration is high.

*"If marketing and sales are organizationally separate so that there is no dialog across two functions on how the sales force is compensated, the results are frustrating. Marketing investments show no "uptake" from the sales force, and the sales people will visualize marketers as fundamentally disconnected from their day-to-day lives." (Matthyssens & Oliva 2006, p. 397)*

Marketing and sales have often different mind-sets, which makes the alignment between the functions problematic (Rouziès et al. 2005). Employees working in marketing and sales tend to be different kind of people with different motivations and goals (Rouziès et al. 2005; Matthyssens & Oliva 2006). The differences can cause conflicts between the two functions. Marketers may accuse salespeople of focusing too much on individual customers and short-term sales profits, whereas salespeople may feel that marketers do not have enough customer knowledge or that they set prices too high. Moreover, misconnection between marketing and sales can lead to inefficiency through lengthened sales cycles and to other problems, such as high market-entry costs and augmented cost of sales. (Kotler, Rackham & Krishnaswamy 2006.)

The discrepancy between marketing and sales can be difficult to fix and the right plan of action depends of e.g. the company size, industry, and culture. However, in many cases, sales and marketing can be integrated through regular, disciplined cross-functional communication and joint projects. In the highly

competitive market, it is recommendable to fully integrate the sales and marketing teams by making them use shared metrics and rewards. (Kotler et al. 2006.)

Järvinen and Taiminen (2016) propose a marketing and sales funnel that binds marketing and sales operations together (Figure 2). Connection between the functions happen when marketing leads are passed forward to sales to be contacted. Often an IT integration between marketing automation software and customer relationship management system is needed. Overall, the marketing and sales funnel consists of five phases. In stage 1 contacts are identified upon leaving their contact information on the company website, utilizing contact info, login, cookies or IP address. When contacts are identified, they can be nurtured and transformed from marketing leads into sales leads.

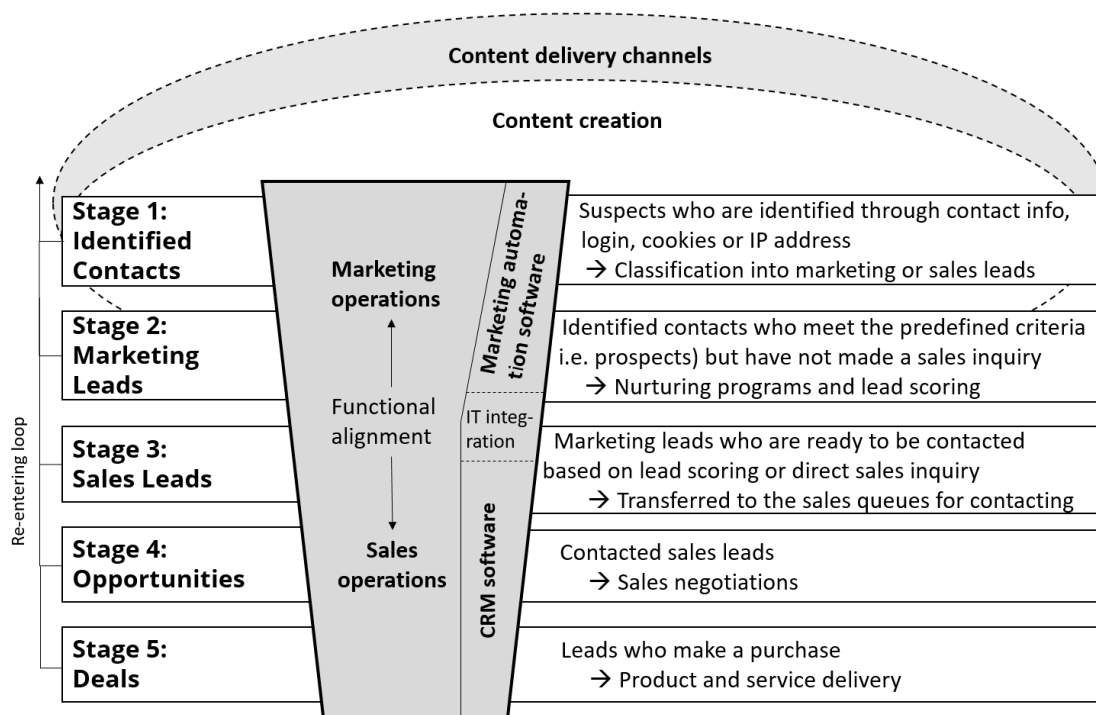


Figure 2 Sales and marketing funnel (adapted from Järvinen & Taiminen 2016)

In stage 3 sales leads are transferred to sales queues and then contacted. Stages 4 and 5 consist of sales negotiations and closing the deals. Sales leads have become opportunities when they have been contacted. At this point, sales department is eager to close a deal and turn opportunities into buying customers. Depending of industry, product, and purchase process, closing the deal can happen quickly or last from days to years.

### 2.3.2 Content Marketing and social media

Digital content marketing is a powerful tool for attracting customers and creating meaningful relationships with them (Holliman & Rowley 2014; Järvinen & Taiminen 2016). Even though content marketing is considered as an 'inbound

method' (HubSpot 2017), it can have goals related to sales and lead generation alongside with brand awareness and customer engagement. Therefore, it is vital to measure the effectiveness of the content marketing to the overall marketing performance. According to Järvinen and Karjaluo (2015), companies can exploit Web analytics to demonstrate how digital marketing activities can have a positive impact on the whole business. However, they deduce that the capability to establish marketing performance is dependent on the company's content, process and organizational context surrounding the use of the marketing metrics system.

Content marketing is highly associated with personalization and customization (Heimbach et al. 2015). IT tools, such as CRM and marketing automation systems have made it possible to efficiently target potential customers with content that is determined to be especially valuable for them. Targeting can be made based on online behaviour, for example and using analytical tools. (Montgomery & Smith 2009). This can be referred as the personalization of marketing mix activities. It is one of the key ingredients of marketing automation (Heimbach et al. 2015), and therefore, it is a vital asset in content marketing as well. Personalization is closely connected with interactive marketing and it can be defined as the customization of some or all the elements of the marketing mix. To use personalized content, company needs to anticipate what customer want and personalize and target its content based on the information gathered from the customers. (Montgomery & Smith 2009.)

Personalization can also be defined more narrowly, as the incorporation of one or more recognizable aspects of a person (e.g., one's first name, last name, title etc.) in a content. Common ways to use personalization are automating emails to start with "Dear First name" and embedding the name of the person in the middle of a sentence. These personalized features need to fit to the content, seem as natural as possible and to be known for the marketer. Even though personalization is not always effective, it can make the text personally relevant for the receiver. (Dijkstra 2008.)

According to Mangold & Faulds (2009), social media has enabled a totally new way for companies to interact with their customers and for customers to communicate with each other. This communication can happen in multiple channels e.g. company sponsored discussion boards and chat rooms, consumer-to-consumer e-mails, consumer product or service ratings websites, Internet discussion boards and forums, blogs and social networking websites. Social media provides lucrative opportunities for companies to carry out their digital marketing activities but at the same time, it makes their work more difficult. In social media, customers can communicate with each other and share information of products and companies providing them. Therefore, companies cannot fully control either the content that has been shared by their customers or the evolvment of their brand image. Nevertheless, companies have a possibility to try to influence and shape the tone of the online conversations by providing e.g. networking platforms and customer loyalty programs, and creating interesting and relevant content to be consumed by the customers.

Karjaluoto et al. (2015) found in their study that B2B company can affect content creation in social media directly by adding new content, contributing to discussions and controlling employees' social media behaviour. Content creation can also be affected indirectly by training employees to create desired content and executing marketing activities that inspire other users to create content that is advantageous for the company. Moreover, companies can benefit from employees' activity in social media if they use it to create personal relationships and promote company's products and services. Therefore, it is more important to concentrate on training employees to use social media properly than to focus on limiting the use.

## **2.4 Impediments and facilitators in three stages**

Honeycutt et al. (2005) have identified impediments to the adoption and implementation of SFA in three stages: planning, communication and evaluation (Figure 3). They have created a framework that presents the impediments but also reveals the impact of these factors to the sales force and sales force's outcomes. This framework can be applied to the adoption and implementation of other ICT systems as well. Therefore, in this chapter, impediments to the adoption and implementation of CRM systems are also categorised based on the three stages. The model from Honeycutt et al. (2005) is used as the main framework in this research and thus, adapted to investigating the impediments and facilitators of a marketing automation system, the impact of these factors to the employees and the outcomes in the organisation.

The framework does not comprise facilitators to the adoption and implementation. However, the impediments can be regarded as facilitators if they do not occur in the implementation process or these factors are executed well. For example, poorly defined goals are an impediment whereas, properly defined goals can act as a facilitator. Moreover, the factors leading to success or failure of the system are typically closely connected (Foss et al. 2008). For example, projects that are planned wisely, generally end up being successful and vice versa, projects that are not planned carefully tend to end to failure.

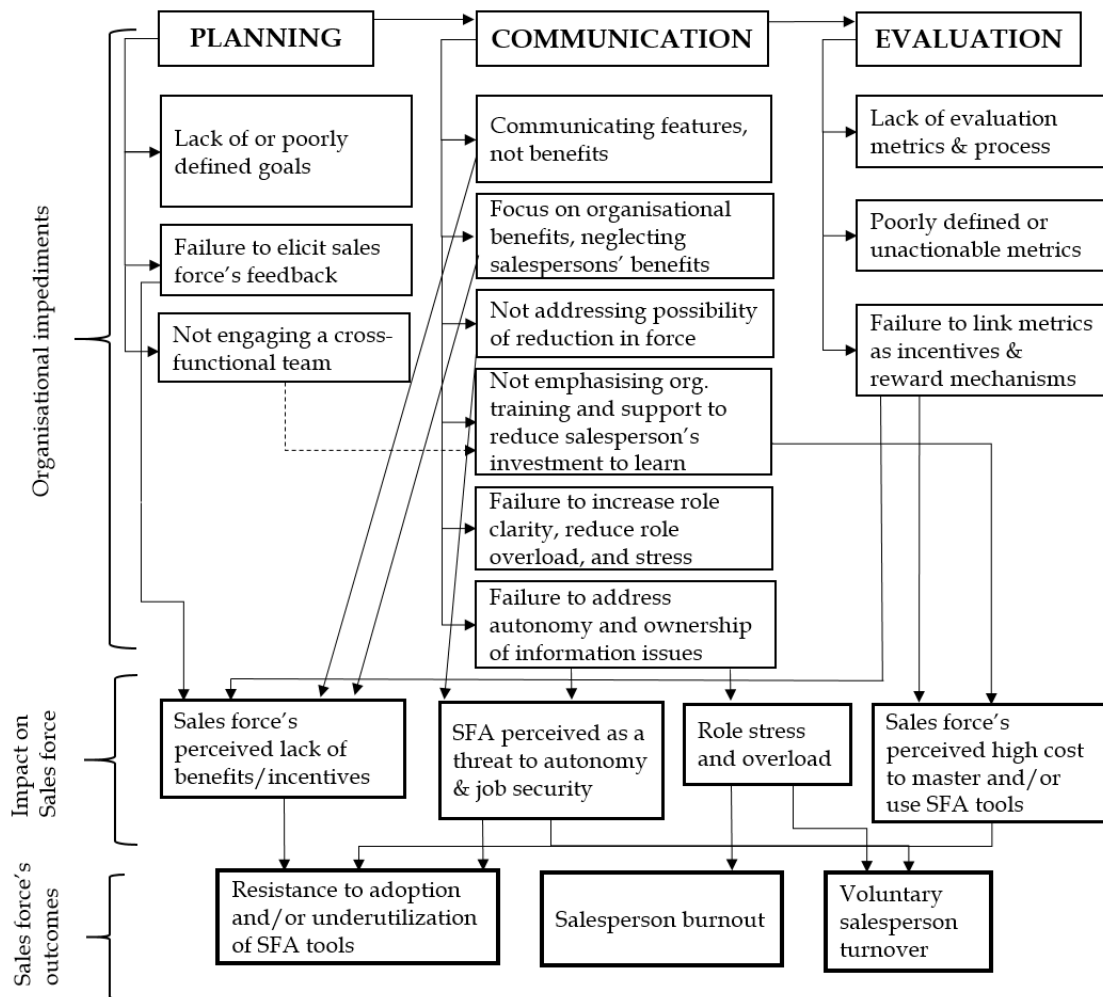


Figure 3 Impediments to the adoption and implementation of a SFA system (adapted from Honeycutt et al. 2005)

### 2.4.1 The planning

Planning phase is crucial because lack of or poorly defined goals is often the first mistake made by many companies. Before the adoption, it is vital to define what company wants to achieve and how the system can help to accomplish it. (Rasmusson 1999.) Cross-functional teams should be involved in the adoption of SFA system, and furthermore, defined goals, expected benefits and requirements from employees should be understandable to all (Rasmusson 1999; Erffmeyer & Johnson 2001; Speier & Venkatesh 2002).

Cost (including the system, training and integration) is an important factor in the adoption of a CRM system. However, Alshawi et al. (2011) found out that the cost has a bigger importance on what CRM system to purchase than to whether to adopt CRM or not. The number of alternative suppliers is also important in the adoption phase because it can make the purchase decision more difficult if there is no clear and agreed selection criteria. Furthermore, companies' existing ICT infrastructure, culture change capability, process change capability

and a need for integration affect the adoption of a CRM system. (King & Burgess 2008; Alshawhi et al. 2011.)

Foss et al. (2008) recognized poor planning, lack of clear objectives and not recognizing the need for business change as the key reasons for CRM failures. Consequently, research needs to be executed thoroughly before adopting a CRM system and furthermore, there is a need to assure that employees' knowledge level of CRM is sufficient (Nguyen et al. 2007). Furthermore, it is beneficial that both management and staff have their ICT skills up-to-date (Alshawhi et al. 2011).

Technological implementation should not be done without considering its effects on the whole organization because it alters existing structures and processes. It is important for the success of the implementation that all employees know what is expected from them, how the implementation will affect their work and what are the benefits that will be gained. (Becker et al. 2009; Becker et al. 2010.)

Planning is likely to be as important in the adoption and implementation of a marketing automation as it is with CRM and SFA. If a clear plan is not made for the implementation process, there are bound to be difficulties with communication and evaluation. The whole process may seem unsuccessful if the expectations are set too high in the beginning. For instance, it can be considered that a marketing automation system generates sales automatically without much work needed to be done. Therefore, making a detailed plan and taking into account the requirements for the successful implementation can facilitate the process significantly.

#### **2.4.2 The communication**

To implement SFA system successfully, companies need to assure that they keep communicating and give support also after the purchase (Buehrer et al. 2005). Underestimated time, cost and training are common impediments to the SFA implementation success (Rasmusson 1999; Erffmeyer & Johnson 2001). It is also essential that the whole team participates in the implementation and managers are willing to work with other departments as well (Erffmeyer & Johnson 2001).

It has been shown that training, encouragement, facilitative leadership and organizational support are important for an effective implementation of SFA system. The most important factor is training (instructions and education to use the system properly) because if sufficient training is not offered, it can act as an obstacle for a successful implementation. (Pullig, Maxham & Hair 2002.) Parthasarathy and Sohi (1997) and Buehrer et al. (2005) also highlight the importance of training since it reduces the effort needed to use the SFA system and so forth, increases the usage.

Parthasarathy and Sohi (1997) and Barker et al. (2009) consider it beneficial to try to reduce or completely prevent the resistance from individual sales persons. One strategy to execute this is to first train the most educated and daring sales persons and make them think positively about the system. Then they can convince others of the benefits and act as influencers. Furthermore, learning to use these system needs to be made as simple as possible by offering help and

assistance online. If there is also a possibility to call someone and ask for help, it will enhance the acceptance of the system.

Resistance of change can be an obstacle to a successful CRM implementation as well. Furthermore, inadequate focus on change management, lack of necessary resources and inadequate involvement of end users can lead to the failure of CRM implementation. (Bohling et al. 2006; Raman, Wittmann & Rauseo 2006.) Sales people often resist CRM implementation due to the fear of losing their tacit knowledge of customers. Therefore, it is vital that management supports CRM implementation, takes care of employee engagement and communicates effectively. Moreover, management has a vital role in assuring that employees are willing to share data and that they are trained adequately. (Raman et al. 2006; King & Burgess 2008; Becker et al. 2010)

Lack of support was mentioned in several studies as a major impediment to successful implementation (Pullig et al. 2002; Buehrer et al. 2005). Moreover, encouragement, facilitative leadership and teamwork are necessary for the effective implementation of the SFA system. Without sufficient support, users may get frustrated with the usage and long term benefits may be left unutilized. Consequently, technical problems and user questions need to be handled appropriately. (Pullig et al. 2002.) In many cases training and support are insufficient to guarantee salesperson's effective learning, and according to Erffmeyer and Johnson (2001), 25% of firms do not offer any training for salespeople to learn new technologies.

Since change resistance is one of the biggest reasons why technology implementations do not succeed, management has a key role in preventing it (Gohmann et al. 2005; Barker et al. 2009). One way to fail to promote the system, is to highlight system's definite features instead of communicating the benefits. If benefits are not understood, the usage of the system will be regarded as a burden and an extra work. (Gohmann et al. 2005.) Other strategy to enhance user acceptance comprises managers ensuring the sales team of the system's flexibility. Moreover, they need to assure that the system does not represent a one-size-fits-all model. (Barker et al. 2009.)

To convince employees of the benefits of the system, top management and immediate supervisors need to be committed to the new technology. Best scenario is that both top management and supervisors are devoted because it affects the adoption behaviour positively. (Cascio, Mariadoss & Mouri 2010.) Furthermore, the perceptions of sales people and management should be consistent (Gohmann et al. 2005). Naturally, managers expect to get return on their investment but this prerequisite needs to be communicated properly. It can be beneficial if management emphasizes that sales people are being given the SFA system to stay ahead in their field, enhance customer relationships and grow profits. (Honeycutt et al. 2005.)

Nguyen et al. (2007) and Piskar and Faganel (2009) also highlight the importance of management since CRM implementations often fail due to the lack of project management skills and commitment from the executive management. According to Piskar and Faganel (2009), software solution providers should not be trusted instinctively and cautious control is needed even though it requires



time from the management. Moreover, CRM implementation is more successful when the CRM system offers sufficient technical support and the system can be adjusted to the needs of a company (Raman et al. 2006).

Customer data quality is important for the success of CRM implementation. This necessitates that management focuses not only on the technology but also on developing teamwork and setting priorities. Moreover, executives need to articulate organization's strategy for customer information management and how the implementation of this strategy will then lead to the data sharing and data quality that is essential for the successful CRM implementation. (Peltier, Zahay & Lehmann 2013.) All the factors affecting the adoption and implementation of CRM systems are listed in Table 1.

*Table 1 Factors affecting the adoption and implementation of CRM systems*

<b>Article</b>	<b>Research method</b>	<b>Key findings</b>
Organizational Learning and CRM Success: A Model for Linking Organizational Practices, Customer Data Quality, and Performance (Peltier, Zahay & Lehmann 2013)	empirical	High quality customer data is required to implement a CRM system effectively.
Organizational, technical and data quality factors in CRM adoption – SMEs perspective (Alshaw, Missi & Irani 2011)	empirical	Factors affecting the adoption of CRM are principally similar in SMEs and in other types of organizations. These factors include e.g. purchase, implementation and integration cost, ICT skills of staff and management, organization size, internal support, business objectives, system evaluation and selection criteria, vendor after sale support and customer data infrastructure.
Left Behind Expectations: How to prevent CRM implementations from failing (Becker, Greve & Albers 2010)	empirical	The combination of poorly implemented CRM projects and excessively high expectations are likely to cause the failure of CRM implementation. Furthermore, internal support is a vital factor for the success of CRM implementation.
A Successful CRM Implementation Project in a Service Company:	empirical	The role and knowledge of a project manager, careful planning, outcomes monitoring and

Case Study (Piskar & Faganel 2009)		performance controlling are important factors in the implementation of a CRM system.
Understanding success and failure in customer relationship management (King & Burgess 2008)	conceptual	Critical success factors for CRM are top management support, communication of CRM strategy, knowledge management capabilities, willingness to share data and change processes, technological readiness, culture change/customer orientation, process change capability and systems integration capability.
What makes for CRM system success – or failure? (Foss, Stone & Ekinici 2008)	empirical	Biggest reasons for CRM failures are poor planning, lack of clear objectives and not recognizing the necessity for business change.
Strategies for successful CRM Implementation (Nguyen, Sherif & Newby 2007)	conceptual	Reasons to the failure of a CRM system are e.g. lack of knowledge and research, lack of project management skills and lack of commitment from the executive management
CRM implementation: effectiveness issues and insights (Bohling et al. 2006)	empirical	Resistance of change and insufficient focus on change management, lack of necessary resources and insufficient involvement of employees can be seen as hurdles to a successful CRM implementation.
Leveraging CRM for sales: the role of organizational capabilities in successful CRM implementation (Raman, Wittmann & Rauseo 2006)	empirical	Impediments to successful implementation of CRM comprise lack of flexibility in the software, and lack of skills in end users and not involving them in the implementation stage.

Communication is bound to be essential in the adoption and implementation process of a marketing automation system. The implementation of a marketing automation system requires learning from an organisation, so training is likely to be highly important. There may also occur change resistance because the implementation of a marketing automation system necessitates that the organisation adapts new ways of working. Therefore, facilitative leadership and support from management are bound to facilitate the implementation process.

### 2.4.3 The evaluation

Evaluation of the success of SFA implementation is crucial. Even before the implementation, companies should develop metrics to evaluate how beneficial SFA is for the company. The lack of and poorly defined evaluation metrics are

common impediments for a successful implementation of SFA. Other common failure happens when metrics are not linked to the benefits the system provides. (Honeycutt et al. 2005.) The performance of the implementation should be monitored throughout the process so possible issues can be recognised in time (Nguyen et al. 2007). Foss et al. (2008) found that many issues remain unrecognized for far too long after they are first acknowledged. Therefore, when too long time has passed, problems grow too big to be simply fixed or without much extra damage done.

Evaluation is an important phase also regarding the expectations. CRM implementation projects often fail due to the following two reasons: (1) the system is poorly implemented or (2) managers' expectations are so high that it is not realistic to meet or exceed them. Often the failure is due to the combination of these two factors. (Becker et al. 2010.)

Research has shown that 55–75% of SFA projects fail (Honeycutt et al. 2005). Speier & Venkatesh (2002) found in their study that salespeople consider SFA tools positively immediately after training but after they have used them or had an access to them for six months their preliminary response turns negative. One reason for this is that salespeople end up feeling like SFA tools are not helping them but they disrupt the sales process. This relates to the expectations set for the implementation and future use, as salespeople failed to anticipate the impact the SFA tools have on their future job.

Companies' values have also an effect on the implementation. Pullig et al. (2002) found five shared values that are significant in creating improved commitment towards the successful implementation of the SFA system:

1. customer orientation
2. adaptive cultural norms
3. a culture high in information-sharing norms
4. entrepreneurial values
5. a culture high in trust among its members

In addition, the compensation culture of a firm may affect negatively on the implementation if salespeople do not want to lose their independence and share their customer information with others. The problem may be related to the fear of technology taking salesperson's job or to rivalry (losing customers to others). (Honeycutt et al. 2005.) Sales people may also fear the potential "Big brother" effect. In other words, they may be afraid of managers monitoring them all the time. (Barker et al. 2009.) All the factors affecting the adoption and implementation of SFA systems are listed in Table 2.

*Table 2 Factors affecting the adoption and implementation of Sales force automation*

<b>Article</b>	<b>Research method</b>	<b>Key findings</b>
The impact of management commitment alignment on salespersons' adoption of sales force automation technologies (Cascio, Mariadoss & Mouri 2010)	empirical	Commitment from both leadership levels (top management and supervisors) is the most advantageous to SFA adoption.
Why is my sales force automation system failing? (Barker et al. 2009)	conceptual	Four reasons to low user acceptance: (1) disruption of sales routines, (2) loss of control, (3) dissimilar expectations between management and salespeople, and (4) management's lack of full commitment to the implementation of the system.
Sales force automation: review, critique, research agenda (Buttle, Ang & Iriana 2006)	conceptual	Critical success factors are classified as organizational/cultural, project-related, interpersonal, intrapersonal and technical.
Impediments to sales force automation (Honeycutt et al. 2005)	conceptual	Organizational impediments can be identified in three stages of SFA implementation: planning, communication and evaluation.
Sales force technology usage – reasons, barriers, and support ( Buehrer, Senecal & Pullins 2005)	empirical	Biggest obstacles are the lack of management and technical support, while the main facilitator is training.
Perceptions of sales force automation: Differences between sales force and management (Gohmann et al. 2005)	empirical	Differences between the perceptions of management and salespeople can disturb the implementation of SFA system. Furthermore, benefits of automation should be highlighted more than individual features of the system.
The hidden minefields in the adoption of sales force automation technologies (Speier & Venkatesh 2002)	empirical	Even before the implementation, salespeople should have an understanding of how much the SFA

		technologies will augment the sales role and sales process.
Salesforce automation systems: An exploratory examination of organizational factors associated with effective implementation and salesforce productivity (Pullig, Maxham & Hair 2002)	empirical	A suitable environment for implementation comprises sufficient training, encouragement, facilitative leadership, and organizational support.
An exploratory study of sales force automation practices: Expectations and realities (Erffmeyer & Johnson 2001)	empirical	Teamwork and sufficient training are crucial for the success of implementing SFA system.
The five steps to successful sales force automation (Rasmusson 1999)	empirical	The following factors facilitate adoption and implementation: defined goals, involving salespeople to the adoption, sufficient time dedicated to the implementation, and training and support for users.
Salesforce automation and the adoption of technological innovations by salespeople: theory and Implications (Parthasarathy & Sohi 1997)	conceptual	Formal training diminishes the effort needed to use the SFA system.

Evaluation may be even more important in the implementation of a marketing automation system than it is with CRM because marketing automation system is expected to bring concrete business outcomes, such as a boost for sales. Therefore, it is undoubtedly important that the results of the activities executed with the marketing automation system are reported and communicated in the organisation. Moreover, especially when an organisation adopts a marketing automation system for the first time, monitoring the process all the time is likely to help the company to learn and develop its working methods.

### 3 METHODOLOGY

#### 3.1 Case company description

The case company is a Finnish B2B start-up company whose product offering focus on recruitment software and tools. It was founded in 2014 and its first product was launched in the Autumn 2015. Upgraded version of the product was developed during the summer 2016 and launched in October 2016. The company is headquartered in southern Finland but it operates globally. Finland is the company's first target market but it is expanding to other markets, such as Europe, Mexico, Singapore and UK. The company has 14 employees who work in different roles related to marketing, sales, customer support, and research and development (R&D). However, as the company has relatively few employees, several of them have responsibilities in different functions.

Since the case company is a start-up, it has various changes going on continually. For example, segmentation, pricing and business priorities are bound to alter because all decisions are adapted to the changing conditions. Moreover, the company is constantly aiming to find the most suitable business model; especially sales model and process are altered repeatedly.

In April 2016, new Marketing Director started in his position and the decision to start to invest more in inbound marketing and sales was made. Furthermore, the author of this thesis began to work for the company in the beginning of May 2016. Her role comprises marketing, communications, customer support and sales. She is also responsible for implementing the marketing automation and CRM systems. Nevertheless, she did not contribute to the adoption phase since the software was already acquired when she started to work for the company.

In June 2016, the case company officially changed the company name and recreated its brand image. At the same time, several marketing activities were carried on; new website was created, social media harnessed and blog started to be published one to two times a week. Before the decision to focus more on inbound marketing, the case company had its emphasis solely on outbound sales. The company gathers leads by networking and has an outbound sales company booking online demos with potential customers.

Generally, the sales procedure goes as follows in the case company: 1) an outbound sales company arranges a meeting between the lead and the case company, 2) the meeting in which the service is showcased, is held online or face-to-face, 3) a second meeting is likely to be arranged, and other decision makers may participate in it, and 4) the lead makes the decision to purchase or not to purchase the software.

In 2015, the case company used only direct telesales, online demos and face-to-face meetings to sell its product. In 2016, the inbound marketing methods were started to be used to generate leads. The product needs to be purchased

through online demos or face-to-face meeting with the salespersons and therefore, it cannot be purchased solely online. By meeting contacts directly, the case company aims to learn more about customer needs and the most common issues they have. Learning about the market, allows the case company to improve its product and customize its mode of operation. In the fall of 2017, the case company aims to have a scalable business model, where most of the sales are done through a web shop, and outbound sales are used much less.

The case company acquired HubSpot CRM and marketing automation software in the end of March 2016. HubSpot, Inc. is a company that develops and sells software products focused on inbound marketing. Its tools include e.g. email, SEO, social media, landing pages, analytics and blogging. The HubSpot CRM software is offered free of charge but the marketing software has three pricing packages: basic (185€/month + required 480€), pro (740€/month + required onboarding 2400€) and enterprise (2200€/month + required onboarding 4000€). Every package includes a certain amount of contacts and there is an additional price for contacts exceeding that limit. Furthermore, the basic package has the most limited features, the pro package has several more and the enterprise package contains all features. (HubSpot 2016.) The case company chose the middle-priced package (pro) as it was enough for its needs. The package was sold as a packed software and therefore, it did not include a lot of tailoring. Only the bases for the first landing pages were tailored by HubSpot to resemble the case company's visual look. This comprised adding e.g. company logo, top bar menu and colours on to the landing pages.

Along with the CRM and marketing automation software, HubSpot has an integrated sales software that costs 50€/month per one user (HubSpot 2016). The case company did not acquire this additional software as it was not seen to provide added value for the company, especially comparing to the price.

### **3.2 Case study and action research**

A case study is a method that investigates a case or multiple cases to find answers to specific research questions. The case can be an individual, a group, an institution or a community. (Gillham 2010, p. 1.) According to Yin (2003, p.5-10), a case study approach is suitable for research aiming to find an answer to "how" and "why" questions. Furthermore, the case study is proper when studying real-life events, like organizational processes because it allows the researcher to form a comprehensive picture of the issue. The main research question in this study is 'how a start-up firm can implement a marketing automation system successfully?'. The focus is on one case, the adoption and implementation process of a marketing automation system in a start-up company.

The research strategy used in this study, is an action research. In principle, it follows the paradigm of qualitative research which attempts to achieve greater clarity and understanding of an issue, problem, or question (Stringer 2007, p. 19). Along with the qualitative research, an action research is connected to an action

oriented approach which suits well for practically oriented studies, pursuing to attain a deep understanding of management actions (Pihlanto 1994). Action research seeks to understand how things are happening and how different stakeholders perceive and respond to actions connected to the subject examined. Although action research is closely connected with qualitative research, quantitative data can be utilized. (Stringer 2007, p. 19.)

The following description defines action research holistically:

*“Action research is a participatory, democratic process concerned with developing practical knowing in the pursuit of worthwhile human purposes, grounded in a participatory worldview which we believe is emerging at this historical moment. It seeks to bring together action and reflection, theory and practice, in participation with others, in the pursuit of practical solutions to issues of pressing concern to people, and more generally the flourishing of individual persons and their communities.” (Reason & Bradbury 2001, p. 1)*

With the help of action research, operative solutions can be found to practical problems. Action research does not look for generalizable explanations that can be applied to all contexts; the focus is more on explicit situations and particular, dynamics. (Stringer 2007, p. 4-5.) Furthermore, it provides an opportunity to take action and resolve specific problems (Stringer 2007, p. 6). More explicitly, the research strategy of this study, is a participatory action research. The study is carried on by one person (the researcher) but at the same time, it is affected by other people, such as a family or a team. (Stake 2010, p. 158.) In this case, the latter, i.e. the employees of the case company participate in the study.

Action research was an appropriate choice for this study for several reasons. First, it allows the researcher to participate deeply in to the examination. The situation in which the researcher can investigate the subject inside the company over the long term is highly valuable. Especially in this case, it is beneficial that the researcher can participate in every stage of the implementation. This leads to a more comprehensive overview of the implementation process. Furthermore, instead of just anticipating the possible results, the outcomes of the implementation can be examined. Second, due to the participatory approach of the action research, the researcher is able to develop the implementation process inside the company during the research. The whole company benefits and those stakeholders who should profit from the research have an opportunity to contribute to defining the goals of the research and drawing conclusions from it (Hearn et al. 2009).

Action research can be conducted in several ways but one the most common processes is the ‘look, think, act’ routine (Figure 4). It starts with gathering relevant information and describing the situation. Then the think phase follows, in which it will explored what is happening and how or why the things are as they are. Lastly, comes the act phase which includes planning, implementation, and evaluation. (Stringer 2007, p. 8.)



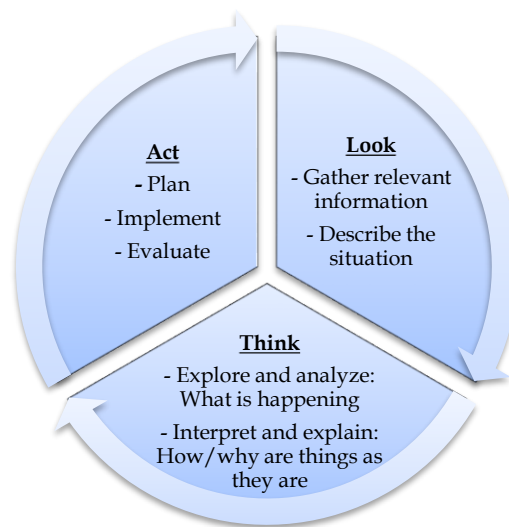


Figure 4 Action research routine (adapted from Stringer 2007, p. 8)

In the literature, the routine is often showcased in a linear format but it should be interpreted as continually recycling set of activities (Stringer 2007, p. 8). In practice, the action research is often a complex process in which the different stages happen simultaneously, procedures are revised and sometimes even radical changes in direction are made (Stringer 2007, p. 9). In this research, the different phases of the routine occur frequently but not always in the same order. Often the phases cannot be clearly separated from each other as they arise instantaneously.

### 3.3 Observation and semi-structured interviews

Qualitative research focus on data that represent personal experiences in particular situations. Collected data is primarily nonquantitative but not exclusively. All kind of data, such as numerical measurements, photographs and indirect observations can be utilized. (Stake 2010, p. 88-89.) Qualitative case studies can embrace several data-gathering methods, such as interviews, documentation, record analysis, work samples and observation (Gillham 2010, p.13). In this research, the data is collected by making observations and conducting interviews with the employees of the case company. Also, quantitative data, such as marketing performance information is utilized in the study.

Interviews are the most used data collection method in qualitative research and an effective technique in discovering individuals' and groups' perceptions and opinions (Saldana 2011, p. 32). Interviews are used for finding out issues the researcher is unable to discover itself by only observing. Moreover,

the purpose of interviews is to acquire unique information or interpretations held by the interviewees. (Stake 2010, p. 90-95) Interviews can be highly structured, comprise a set of prepared questions to be asked in specific order or be totally unstructured and consists only of certain topics. Interviews are not necessarily set up in advance, they can also happen spontaneously. (Saldana 2011, p. 32.)

In total, 18 interviews were arranged in three different phases of the implementation process, in August 2016 (the early stage), December 2016 (the middle stage), and February 2017 (the final stage). The interviews were conducted one by one and face-to-face. They were semi-structured, which means that the questions were planned beforehand and they were conducted in the same order with each participant. Nevertheless, the choice to use semi-structured interview as the data collection method, gave a possibility for the researcher to ask additional questions during the interview, when needed. The questions in the early stage were formed based on the theory and initial observations. The questions in the middle and final stages were based on previous interviews, observations, and progress being made in the implementation process.

The sampling method used in this research is purposeful sampling. When using this method, the persons who have the most valuable information considering the research subject are chosen to participate in the study (Patton 2002). As this research is conducted as a case study, logically the employees of the company were interviewed (Table 3). Six employees were originally chosen to participate in the study, based on the likelihood of them providing substantive answers. In the company, they are the most involved in the implementation process and they represent different perspectives as they work in different roles in the company. The Sales Manager who was interviewed in August did not participate in two other interviews as he left the company in October. In this research, he was replaced by a new employee who started to work in the same position in the company. Therefore, he participated in two later interviews, and all other participants were interviewed three times.

*Table 3 Interviews 2016-2017, Case company*

Title and role/responsibility	Interviews
<b>CEO</b> <ul style="list-style-type: none"> <li>operates as the company director</li> <li>contributes to B2B sales</li> <li>supports other key activities</li> </ul>	1. August 2016 2. December 2016 3. February 2017
<b>Co-Founder &amp; CTO</b> <ul style="list-style-type: none"> <li>vital role in product development</li> <li>contributes to B2B sales</li> </ul>	1. August 2016 2. December 2016 3. February 2017
<b>Marketing Director</b> <ul style="list-style-type: none"> <li>responsible for marketing with the author of this thesis</li> <li>participates in the implementation of the marketing automation system</li> <li>has a key role in brand management and web analytics</li> </ul>	1. August 2016 2. December 2016 3. February 2017

<b>Sales Manager 1</b> <ul style="list-style-type: none"> <li>• responsible for B2B sales</li> </ul>	1. August 2016
<b>Sales Manager 2 (October 2016-)</b> <ul style="list-style-type: none"> <li>• responsible for B2B sales</li> <li>• key role in the implementation of CRM</li> </ul>	1. December 2016 2. February 2017
<b>Customer Success Manager</b> <ul style="list-style-type: none"> <li>• responsible for customer service and B2B sales</li> <li>• assists in marketing</li> <li>• has a vital role in the usage of CRM</li> </ul>	1. August 2016 2. December 2016 3. February 2017
<b>Solution Designer, R&amp;D team leader</b> <ul style="list-style-type: none"> <li>• responsible for product development</li> <li>• integrates CRM and marketing automation system to the case company's software</li> </ul>	1. August 2016 2. December 2016 3. February 2017

Each interview took an average of 30 minutes, and the interviews were conducted either in Finnish or in English. The responses were recorded thoroughly in writing during an interview and worked through right after the interview was conducted. The data was transcribed and analysed first after each interview stage and then once again when all the interview data was collected.

In addition to the interviews, observations were carried out during the entire implementation process. Observation data is commonly exploited in qualitative research and it stands for the information the researcher can directly hear or feel (Stake 2010, p. 90-95). There are two forms of observations: detached and participant. In the former, the researcher is not involved in the case and he/she is more of a 'fly on the wall'. Participant observation is more commonly used because the researcher is involved in the settings, for example by working there. An important part of this data-gathering method is to keep a record while observing (Gillham 2010, p. 21).

In this study, the observation data was collected throughout the implementation process, during 10 months (from May 2016 to February 2017). The researcher was working in the case company so the form of participant observation was appropriate. During the research time, the researcher kept a research log in which the observations were recorded. The notes were based on observing the conversations in the company and progress being made with the marketing and sales activities, such as the growth in website traffic and lead generation. The final analysis of this research is based on the interviews, observations and quantitative data, such as the metrics provided by the marketing automation system.

### 3.4 The role of the researcher

The author of this thesis was the so called 'system owner' inside the case company. Furthermore, she had the main responsibility to execute the implementation process. The researcher was accountant for the technical side of the implementation process, developing the tactics for using the system more efficiently, teaching others to use the system, and monitoring the results and communicating them to others in the organisation.

It was highly beneficial for this research that the researcher was working in the company during the research period because she had the possibility to observe the everyday conversations among the employees. She attained deeper knowledge of the activities going on inside the company than she would have been able to reach as an external researcher. Moreover, it was beneficial that the researcher made the observations and interviews during a longer period than just exploring an individual time point. She got to witness the whole implementation process from beginning to the end and recognise the changes inside the company. Besides, she identified how attitudes altered during the process and therefore, how they affected the progress of the project. Lastly, an extensive research period allowed the researcher to recognise the outcomes of the implementation process, which indicate the successfulness of the implementation process.

It is natural that since the researcher was responsible for the implementation project, she contributed to the success of the implementation process, and therefore to this study as well. Notwithstanding, she acted as objectively as possible when executing observations and interviews. She also had a critical approach to her own success in the process. Moreover, she had an impact on the outcomes of the implementation process but the impact is mostly due to her being deeply involved in the process because of her job role and not the fact that she was carrying out this study. Observations and interviews revealed a lot of information and it was all the time critically examined.

## 4 RESEARCH FINDINGS

The research findings of this study are categorised based on the framework presented by Honeycutt et al. (2005). The implementation of a marketing automation system in the case company was researched for 10 months so different phases were recognised. The planning phase comprises the reasoning for the purchase decision, goals set and estimation of the possible benefits, risks and complications. The communication phase comprises the actual difficulties during the implementation process and the reaction of the organisation to these issues. Lastly, the evaluation phase encompasses the assessment of the key marketing and sales activities in the case company and the overall successfulness of the implementation process.

### 4.1 The planning

#### 4.1.1 The reasons behind the purchase decision

Before the case company acquired HubSpot, it did not use any marketing automation or CRM system. Almost all employees had an idea of what marketing automation is before the system was acquired. However, none of the employees had used any marketing automation system previously. Furthermore, apart from the marketing team, the employees did not have a particularly deep understanding of marketing automation system's functionalities.

The idea for the acquisition of a marketing automation system came from the case company CEO's acquaintances who recommended HubSpot. The company did not compare HubSpot to other marketing automation systems before it was obtained. Price was a major factor in the decision making since HubSpot offers a large discount of their pro package for start-up companies. The discount is valid for one year. The second year is offered with smaller discount and the third year will go according to normal pricing.

*"They had a start-up program with a discount. My acquaintances thought it was a good system and CRM was linked to it. It seemed like a reasonable solution."* CEO

With the full price, the case company probably would not have purchased a marketing automation system at all because it would have been too expensive. Apart from the price, a possibility to get a CRM system free of charge when purchasing a marketing automation system, was a contributing factor in the decision making. CEO made the final purchase decision but also Sales Manager, Marketing Director, and Co-Founder took part in it.

*"We actually only had HubSpot in mind because the marketing director saw HubSpot as the future of marketing automation. So, we did not consider other systems. I also saw it*

*as a rational investment. Luckily, we got in to the start-up program so we got it cheap.*  
**Co-Founder**

The main purpose to acquire a marketing automation system was to automate digital marketing and operate as efficiently as possible. Marketing automation system was seen as an additional resource that reduces employees' workload.

*"We have a low level of resources and we need to automate every single activity that can be automated. In other words, because we are slim on resources, we need to build highly skilled marketing automation machine. We aim to have a scalable sales model for which marketing is continuously feeding warm leads in a systematic way. Big part of our sales will take part online so the entire sales and marketing machine needs to be streamlined and optimized."* **CEO**

*"HubSpot was purchased for having a state of art platform for digital marketing."* **Sales Manager 1**

One key benefit of marketing automation was seen to be a lead generation. Marketing automation system could help to build brand awareness and boost sales.

*"It increases the level of our marketing. More companies are aware of our existence and they buy more. We have more people in the beginning of a sales funnel. HubSpot brings sales but probably not immediately. It also increased our level of awareness and makes marketing and sales automated."* **Co-Founder**

Also, website tracking and data collection were considered as major benefits. Marketing automation system could help to understand buyers better and find new information about the market, or even new segments.

*"First of all, it provides insights about people who are interested in our solution and it helps in lead generation. HubSpot is also an important tool for inbound marketing, and the integrated CRM will help us as well."* **Sales Manager 1**

*"Obviously, we are aiming for better inbound marketing and lead generation. We hope that HubSpot will help us in making people more ready for sales. Doing this automatically is a better choice than trying to figure it out ourselves. Personally, I hope HubSpot will bring knowledge and data about new kinds of buyer profiles (data we would not know ourselves). I also hope that HubSpot will help us to find out what our target group is interested in so we can make our solution more attractive for them."* **Marketing Director**

In addition, marketing automation could enable the case company to communicate more efficiently with prospects and customers. Content sharing, via blogs, newsletters and social media, could be automated with the marketing automation system. That would lead to more efficient marketing and

communication. Furthermore, it is a benefit to be able to share content through one platform, instead of using several different systems.

#### **4.1.2 The goals for the implementation process**

There were no specific, common goals set for the implementation or they were not known for the employees. Still, employees were able to specify their personal goals, for example, improved brand awareness, efficient communication with prospects and customers, lead generation, boosted sales, and automated digital marketing.

*“Key goal for HubSpot is to have automated digital marketing and help us to communicate with prospects and customers. HubSpot should also help us in content marketing and in identifying potential customers.”* **Sales Manager 1**

*“First, I would like to learn to use it in my everyday work. I want to get value out of HubSpot and automatically send messages to contacts, for example.”* **Customer Success Manager**

All employees had goals that were associated to lead generation. Especially the founders of the company considered that the system should help to boost sales and close deals.

*“I would want to see a first client who has purchased our product based on purely marketing carried on through HubSpot.”* **Co-Founder**

*“Goal for the implementation of HubSpot is to sell a lot of stuff and get a lot of leads. Make quick sales and close a deal faster.”* **CEO**

Marketing function considered lead generation one of the key goals but also saw value in using the system to be able to improve company's business by gathering relevant data. Eventually, all other minor goals, such as brand awareness should lead to the most important goal, lead generation.

*“Basically, the main goal is to generate leads for sales people: that is the hard goal. Softer goals are to acquire more knowledge and better understanding of what interests people in our solution. Through automated social media activities, we aim to improve brand awareness and brand recognition. Still in the end, we need more leads to get sales and revenue for the company.”* **Marketing Director**

#### **4.1.3 The risks, possible negative impacts and difficulties**

There were not seen to be any major risks in the technical part of the implementation. Moreover, the system itself was not considered insufficient in any way. The risks were more associated with the actions of the company itself. First, failing to use the system properly was considered as an important risk.

Sales Manager (1) stated that if the system is not utilized as efficiently as it could be or only limited functions are used, the benefits will not be achieved.

Three of the interviewees mentioned that there is a possibility that prospects and customers may not like automated marketing messages or they may consider them impersonal. There were also minor concerns related to the amount of work that the implementation of the system will cause. In addition, it was considered as a risk that only one person is fully in knowledge of the system, since she may leave the company someday and the knowledge disappear with her.

The possible difficulties in the implementation of a marketing automation system were related to the human resources. As the case company is start-up, it has a limited amount of resources and it is difficult to find time to do everything needed. It may also be difficult to get everyone to use the system. Furthermore, interviewees mentioned that it is vital to have a clear owner for the system, and she needs to educate others and take the main responsibility. Based on the initial interviews, all employees knew who was the owner of the system. They could also estimate what would be their role in the implementation process.

*“Well, it is another system for us and it requires a lot of time and resources from us. The most difficult part is the lack of resources, because adequate resources allocated to HubSpot take a lot from us. If we find out that HubSpot does not work, may we need to import our data to some other system later on.”* **Marketing Director**

The case company got the system for one year with a significant discount so it might be a problem after the year to start to pay the normal subscription fee. The pricing also includes an additional price for extra contacts in the database. So, if the company would get a lot of leads, the price for the system would increase.

*“One difficulty is to get everyone to use HubSpot actively and first learn to use it properly. HubSpot may also become too expensive for us.”* **Customer Success Manager**

The case company may face difficulties if it finds out that marketing automation does not work for the particular market sector. That is one reason why the case company may not succeed with the implementation. Other reasons are related to failing to create relevant and interesting content. If content does not interest case company's target group, they do not give their contact information and the leads will not be generated.

*“Difficulties we may face are that we have set up something wrong or our content is not interesting, people do not register and we do not get leads.”* **CEO**



## 4.2 The communication

### 4.2.1 Preliminary issues in the implementation process

During the first four months after the purchase of the marketing automation system, the case company did not execute any marketing automation campaign. HubSpot was used mainly for setting up ground work for the future and automating social media activities. There were not any major problems with the technical implementation itself, only a few technical difficulties that were solved reasonably quickly. HubSpot's customer service worked well and they could assist in everything needed. The reasons for not carrying on any marketing campaign through HubSpot during the first four months after acquiring the system, were related to the changes going on inside the company.

In June 2016, the company changed its company name, which required redoing of a website and templates in HubSpot, for instance. Furthermore, the case company hired several new employees, and in May 2016 the mainly responsible person for the implementation started as a new employee in the company. She had an education and working experience in marketing and she knew what is marketing automation. However, she had not used any marketing automation system before. Inside the company there was no one who could educate her of the usage so it took time to learn. Nevertheless, she participated in a marketing automation training course in Dublin in June 2016 which turned out to be extremely helpful. It speeded up the implementation process.

According to the interviewees, one of the most important reasons why the case company had not been able to use HubSpot more efficiently during the first four months, was related to the lack of content. The company learned that it is not possible to utilize marketing automation if there is no content to be shared.

*"At least I am not aware of automated marketing that has been done by us so it has not been yet used for the purpose it was bought for. It could have been more in use. One difficulty is the lack of content and good marketing cannot be done without it. It takes effort from all of us."* **Co-Founder**

*"We have not had enough content to use the system properly."* **Marketing Director**

The company had been going through different changes which had made it difficult to concentrate on content production. As well as hiring new employees, the case company started to develop its new product version in the beginning of summer 2016. It took a lot of time from the company and delayed for example content creation and website designs. Furthermore, there were summer holidays in June and July, which took time from work.

*"I think we should have already created content to be downloaded but the content production has not been in the focus of the organization. The focus has been on something else."* **Sales Manager 1**

Only a few interviewees had expected that the case company would be more far with the usage of the system in August 2016. Others had not expected more than the situation was at the time. However, they all anticipated that progress would start happening soon and real value would be gained from the system.

*“One-word answer is no but the reason is that the case company’s product is not there where it should be yet. To could have been able to move faster it would have required more ready product etc. This was not dependent on the HubSpot’s side. Overall, we are in an initial phase with our product development so there is not much we could have done. So far, I think I have not been expecting more of things that have happened.”* **Marketing Director**

It is notable that the communication inside the company could have been more efficient during the initial phases of the implementation. The system owner should have reported better for the work that had been done related to the implementation. There had been many steps that had required time, for example, building landing pages, integrating marketing automation system to the case company’s service and connecting social media channels to the system. At the same time, there had been work related to the CRM software, such as importing contacts and editing different settings. The reason why the communication was not better was related to the lack of experience and not being able to focus on the project.

*“No, we are not there where I hoped we would be. It is hard to know how much work it requires and I expected the process to be faster and I have no visibility of how much time has been dedicated so far.”* **CEO**

Even though there is a need for improvement in communication, the employees work well together and there are not any major issues between them. Furthermore, marketing and sales work in partnership efficiently.

*“The co-operation between marketing and sales works well and seamlessly and in two directions. If marketing has an online lead, it passed it along to sales and vice versa, if sales has a lead, marketing can nurture the lead with e.g. newsletter.”* **Solution Designer**

Both marketing and sales act in accordance with the same mission, however, the goals could be more concrete. According to the CEO of the company, the employees in sales and marketing get along extremely well on a personal level but the dialog among them could be more concise and consistent. Sales should present clear needs for marketing and vice versa, marketing to ask help from sales. Furthermore, he considers that marketing should teach others more about the systems’ functionalities.

*“The system is used properly by only couple of employees. Everyone should be get on board. This could be achieved by communicating more efficiently with the team. The*

*marketing should teach other employees about the logic of the system. Also, results need to be shared."* **CEO**

Along with lacking resources to be used in marketing, the company was struggling with learning to use the system properly. Especially the employees working in sales had difficulties in recording all their activities into the system. This was mostly due to being busy and not having enough training and communication inside the company.

*"I do not see everyone using the system systematically yet so there is still work to be done in that area. Sales funnel would be excellent if everyone would remember to do all the manual work that needs to be done to keep the database up to date"* **Co-Founder**

#### **4.2.2 Improvements in the implementation process**

In December 2016, the case company had used the marketing automation system for approximately eight months. A few changes had happened since August, such as company's upgraded product had been launched, and the company had participated in a business accelerator program (5 weeks) and in one major event. In addition, the company had hired new employees, such as a new Sales Manager and an Intern for sales and marketing.

These changes in the company helped the case company to speed up the implementation process, and overall, invest more resources in marketing. New employees contributed to content production so more content was produced. The company received a lot of attention thanks to the business accelerator program and other events, which also brought more people on the company website and thus, generated leads. Therefore, the marketing automation system was also utilized more efficiently and the implementation process progressed. The company gained also more understanding about what type of companies visit the company website and why they are interested in the story and solution. This helped the company to improve its marketing activities.

*"Considering that we are a start-up company, our marketing is pretty advanced. We have the capability to produce content and connect it to marketing automation, and also get real data out of it. We have also been able to combine outbound and inbound activities efficiently, which is excellent. Still, we have a long way to go for real conversions and there are channels we have not yet utilized."* **Sales Manager 2**

Considering the effort been put into the implementation, the situation was reasonable. However, the company, had failed to allocate resources to the implementation in the beginning, and that is one of the reasons why the system had not been fully utilized yet. The employees considered this as an organizational problem and individual employees could not be blamed. Time had been allocated to other work.

*"The whole service helps us already at this point really well. The biggest problem so far has been the manual work that need to be done, such as updating contact details and offers. This is always an issue when people are working. I see that the development areas concern the organization, not the system. We have to find the right methods how to work more efficiently and accurately, not to get new tools."* **Sales Manager 2**

Thanks to hiring new employee to help in marketing, the company had boosted its content creation by publishing two blog posts a week and promoting them more frequently. This and other marketing activities led to the amount of website visitors doubling in a half a year. In addition, the company sent its first newsletter in November 2016 for 700 contacts.

*"We have published two blog posts a week which is ok but we could publish more. It cannot be seen yet if the content is interesting enough – we need more volume first. Now we have about 1500 website visitors a month but we should get more conversions out of them and get business results. Nonetheless, we do not yet know how many of the visitors are potential customers for us."* **Marketing Director**

All interviewees agreed that the company's social media activities had been successful and helped the company to direct traffic to the website. Especially company's Twitter activities had been effective since the number of followers had increased steadily at a fast pace. Company's social media activities had also directed a significant amount of traffic to the company website and generated leads.

*"Our social media activities are on a good level and our content seems to interest people because the number of followers has grown so rapidly."* **Solution Designer**

The advanced content creation and other improvements had helped to boost the lead generation. During the fall 2016, the usage of marketing automation system had produced 50 marketing qualified leads and 30 sales qualified leads. The conversion (how many visitors on a landing page converts into leads) increased when the effort to leave contact information was simplified. First, the company asked several questions in a form (name, company, email, job title etc.) but after one month, this was changed to asking only an email address in the form. This had a significant impact on the conversion, as it grew 10%.

In the beginning of December 2016, the leads were not yet led to becoming customers. CEO of the company found the slowness of the decision-making process disappointing. Converting the first excitement about the case company's solution to purchase decision was a challenge.

*"To make the system work and get real benefits from the usage, has taken time from us. We have been able to get some inbound leads and the amount of website visitors has grown. Still, I would have liked to have seen more business results but I don't know if that is an unrealistic expectation. Anyway, the change has not been as big as I would have hoped for."* **CEO**

There are also other things that the company could do to improve the implementation of the marketing automation system. One major thing is that still more time should be allocated to marketing. Employees are already working long hours so the solution concerns more about prioritization. More financial resources will not be invested in marketing as the company has decided not to use paid advertising at this point. Instead, more effort will be put on pure inbound marketing to discover what kind of content works and what does not.

Keeping the CRM system up to date is important for making the marketing automaton effective and make the collaboration between marketing and sales activities fluent. All employees agree that it is important to utilize the system as efficiently as possible and make everyone committed to the usage. The data should be up to date all the time and everyone should work in a same way. Sales Manager considers that if the database is not up to date, the company may contact wrong people or send wrong messages to them. Besides, the contacts in the database, need to be relevant, not just any contacts.

*"We need to get the right contacts; it is not enough just to grow the amount of contacts in the database, they need to be relevant for us and have a possibility to affect the purchase decision."* **Customer Success Manager**

During the year of 2016, the usage of marketing automation system generated 70 leads. This result was presented for the management team of the case company in December 2016.

*"I did not know before December that we have so many demo requests."* **Co-Founder**

Showing the marketing results convinced the management of the usefulness of the marketing in generating leads. They considered that more time and effort should be allocated in marketing and especially in content production. Therefore, the company made a decision that each employee would start to write at least one blog a month.

*"If we can get a few leads by writing one interesting blog post, we should definitely do it. I should also write more."* **Co-Founder**

Moreover, new priorities in marketing were decided for Q1 of 2017 based on the progress with marketing efforts in 2016. The number one on the list was to increase the number of sales qualified leads (SQLs) and marketing qualified leads (MQLs). This would be done by increasing the amount of content, sharing it more efficiently and renewing the website.

*"We could talk to others who have used the same marketing automation system before and learn the best practice from them. We need to produce more content and change our website to appeal to our target group. We need to touch the heart of these people but also tell concretely what we do."* **CEO**

The internal communication inside the company improved all the time during the entire implementation process because the knowledge level improved at the same time. Furthermore, the communication got more efficient by having more time to allocate to marketing. This made the process go forward.

*"The person who is mainly responsible for the implementation process needs to be vigorous. It is vital to communicate with the organization that the results are positive and improving. This makes everyone understand what is going on with the project and that there is a reason to invest in it. In our case, I see the system owner has learned a lot during the process. She has become better in communicating the results more systematically."* **CEO**

### 4.3 The evaluation

HubSpot has been a useful system for the case company; it has helped in e.g. scheduling social media posts, generating leads and automating communication. These activities have led to growing number of leads, website visitors and social media followers. In addition, the company has increased its knowledge of the market and customers.

*"Concrete achievements are that we have automatized our lead generation process with the demo requests and downloadable guide. We have also started to publish a newsletter."* **Marketing Director**

*"We have increased the number of website visitors and inbound leads. We have also received more information about what people are interested in."* **CEO**

Overall, using marketing automation system has enhanced company's sales and marketing activities. HubSpot's metrics are considered useful as they have enabled the company to learn more about what works and what does not. Based on these learnings, the company has altered its activities and improved overall efficiency.

*"We get data of our marketing and sales activities and based on them, we can make predictions. If we would not have the marketing automation system, we would not probably follow our activities as regularly as we do now."* **Co-Founder**

*"Using marketing automation system has enhanced our marketing and sales activities by getting demo request, in example. We have relevant metrics that we can use to monitor the process. A system is only a system but we have been responding to demo requests as well. Moreover, marketing and sales work seamlessly together."* **Sales Manager 2**

One of the main benefits of having HubSpot in use is that manual work can be automatized. It is important for the case company since it is running low with

resources. HubSpot has reduced a lot of hassle there was when the company did not have any marketing automation or CRM system.

*"When we did not have the system, we did everything manually. Now our activities are systematic and professional. Contacts and conversations are all in one place."* **Customer Success Manager**

*"We have made our marketing process more efficient and decreased the amount of manual work e.g. in lead generation. We have customer data in one place as all actions are recorded to HubSpot."* **Solution Designer**

According to the CEO of the case company, HubSpot has brought a systematic approach to the company's marketing and sales activities. It has forced the company to look at the big picture and enabled it to have a common thread. Also, the Marketing Director and the Co-Founder agree with him and consider that if the system would not have been used, the company's marketing would not be as advanced as it is now.

*"I don't know what our marketing would be without HubSpot, maybe 10% of what it is now."* **Co-Founder**

*"We could have done similar actions without the system as well. However, if we would not have had the system, we probably would have not done those activities. The system guides our actions."* **Marketing Director**

The case company analyses its marketing performance through social media, content creation and lead generation. The metrics that are regularly followed are the number of Twitter followers, blog posts published, website visitors and leads generated. Furthermore, the case company monitors, inter alia, its overall performance in social media, the traffic sources on the web site, and the conversion rates on the landing pages.

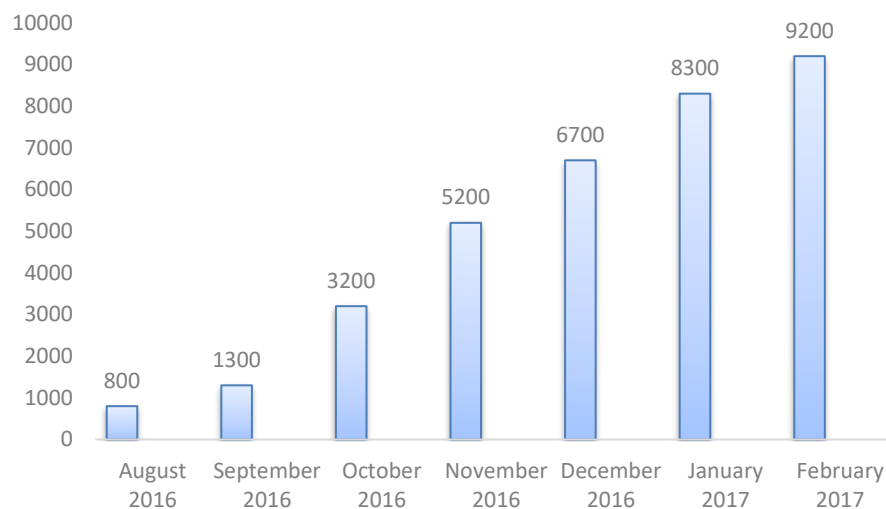
#### **4.3.1 Social media activities and website traffic**

The main social media channels of the case company are Twitter, LinkedIn and Facebook. In the beginning of May 2016, the case company had less than 100 followers in Twitter, around twenty followers in LinkedIn and Facebook page did not yet exist. In June 2016, the case company started to use social media more actively and special effort was put in the company Twitter profile and the Twitter profiles of two employees. The idea to invest time also in employee profiles was made based on the opportunity to retweet the content of each other and get it spread more widely.

The case company posted three times a day from each account during the weekdays and twice a day on weekends. These tweets either highlighted others' articles about interesting topics or promoted the case company's own blog posts, marketing offers or a possibility to request a demo. In addition to sending

company's own tweets, the case company was active in retweeting others' content. In general, five to even ten retweets were done during one day from one account.

In September 2016, after three months of active usage of Twitter, the case company had 1300 followers in Twitter. This was achieved without any paid advertising but marketing automation system was used for automatizing tweets. Usually weekday tweets are pre-set on Monday and weekend tweets are pre-set on Friday. The option to schedule tweet makes it possible to post anytime of the day and on weekends without needing to work. In the end of 2016, the number of Twitter followers was already over 6000. In February 2017, the number had grown to more than 9000. The growth can be seen in Figure 5 which presents the number of Twitter followers in the end of each month.



*Figure 5 The number of Twitter followers in the case company*

The case company promoted its blog posts also in LinkedIn and Facebook. As well as the tweets, these messages were pre-set with the marketing automation system. However, LinkedIn and Facebook were used much less than Twitter because the company considered them not to be as useful. LinkedIn is a 'closed channel' so only the followers of the company can see the messages. Facebook fosters paid advertising which makes it difficult to get publicity for the posts. In February 2017, the company had a bit more than one hundred followers in Facebook and the same in LinkedIn.

Overall, marketing automation system was found to be useful in social media publishing since it offers a browser extension that enables publishing to all channels (also at the same time) from any website without logging into the marketing automation system. It also encompasses a possibility to link employees' personal social media accounts into the system. This makes it convenient for one person to manage several accounts simultaneously.



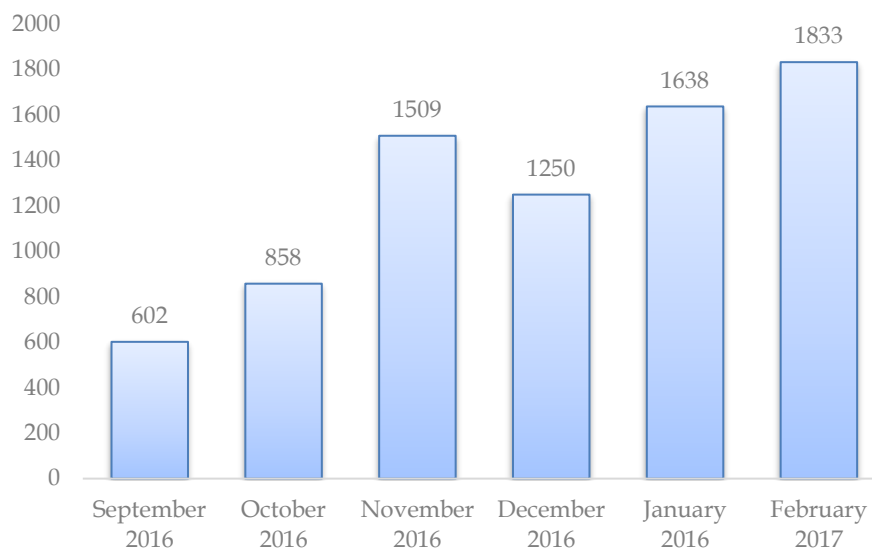
In addition to social media publishing, the marketing automation system's social media tool offers a possibility to monitor social media discussions. One of the best qualities of this feature is that a company can make a list of its contacts and follow their social media activities. In the marketing automation system, there is also a possibility to follow posts with a certain hashtag. Despite of these attributes, the case company decided to use other tool for monitoring. In the end, HubSpot was not considered as efficient, complex and user-friendly as other applications focusing solely on social media publishing and monitoring.

All in all, the case company used marketing automation system's social media features to publish and monitor its contacts. Other social media actions were actualized elsewhere. Publishing could have also been carried on elsewhere but the case company decided to use HubSpot for that. This was due to the usefulness of the browser extension and reporting tool. If all social media posts are posted through the marketing automation system, a company can see the reports of how it is performing. Vice versa, if social media messages are posted through other aps or natively, HubSpot cannot be used to check their performance.

All employees consider that the company has succeeded in its social media activities. The marketing automation system has helped in improving the results automating the posts, in example.

*"It has been amazing what we have been able to achieve in social media, and in Twitter in particular. It is beneficial for us as we get visitors to our website when we automate social media messages and other communication."* **Co-Founder**

Social media has been valuable in creating brand awareness and directing traffic to the company website. The company has been able to grow the number of website visitors each month (Figure 6). The only exception is December 2016. The number is possibly so low due to Christmas holidays. The target group of the case company has had holidays. Also, the employees of the case company had been on holiday and therefore, they have been less active in their marketing and sales activities.



*Figure 6 The number of website visitors in the case company*

Startup100 ranked the case company as number 41 on the list of most trending start-ups in Finland of December 2016. Making it into the list shows that the case company has succeeded in its online marketing. Startup100 tracks start-ups' performance virtuously from the marketing communications point of view. The trending listings is based on what kind of online marketing activities the companies do, how well they do it, and how much buzz they generate. (Startup100 2016.)

#### **4.3.2 Content creation, brand awareness and publicity**

The case company started to publish a blog in June 2016. During the summer, it was published once a week or less due to the lack of human resources. Since a new intern started to work for the company in September, more resources could be allocated to the content creation. The blog was published twice a week until January 2017. In January, several more employees started to participate in the content production and since then the blog has been published three to four times a week.

The case company do not publish its blogs through HubSpot even though it would have been a possibility. The main reason for this decision lies in convenience. The company uses WordPress to manage its website so it was more suitable to publish the blog through that as well. However, most of the CTAs the company uses are created with HubSpot and they are manually embedded into the blog posts.

The content developed by the case company is found on its website, while social media channels and e-mail newsletters, are mainly used to promote that content and direct traffic to the company website. The content includes blog posts (Table 4) and marketing offers, such as downloadable, digital guides and infographics. The company has increased the number of blog posts since

September 2016. In February 2017, the company published 14 blog posts which was 9 more than six months before (Table 4).

*Table 4 Blog posts published and newsletters sent by the case company, and articles about the company published in media*

	Blog posts	Newsletters	Media articles
<b>September 2016</b>	5		1
<b>October 2016</b>	5		1
<b>November 2016</b>	10	1	
<b>December 2016</b>	8	2	7
<b>January 2017</b>	12	1	3
<b>February 2017</b>	14	1	1
<b>In Total</b>	<b>54</b>	<b>5</b>	<b>13</b>

The case company sent its first newsletter in November 2016 and it included information about the upgraded product and newest blog posts. Since then the company has sent one newsletter to all contacts once a month. Each newsletter highlights two to three blog posts and shares topical information. Furthermore, it comprises two CTA buttons (1. download a marketing offer and 2. request a demo). In addition to the monthly newsletter, the company sends other newsletters/marketing emails based on different campaigns. For example, in December the case company sent a newsletter to contacts whose information was gathered in an event.

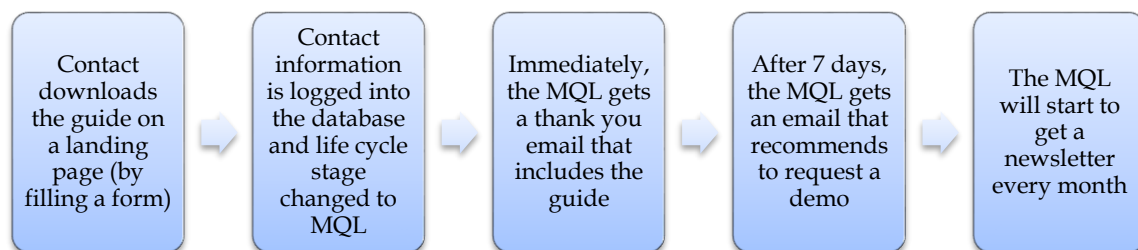
In January 2017, the case company added a subscription form on every page of its website. It allows the website visitors to subscribe to the company newsletter. When the person subscribes to the newsletter, he types his email address and it is automatically logged into the HubSpot database. His life cycle stage changes to subscriber and he receives an automated email that thanks him for subscribing to the newsletter and also promotes the opportunity to request the company demo. In total 32 people subscribed to the company newsletter in January and February 2017 (Table 5).

During the research time, the case company pursued to reach media publicity. In December, the company published its first press release and it got good visibility in Finnish media. In total, seven newspapers and magazines, such as Kauppalehti, Tekniikka ja Talous and Taloussanommat wrote an article about the company. Furthermore, Talouselämä magazine chose the case company as one of the hottest start-ups in Finland 2017, and an article about this selection was published in the print magazine in February 2017. (Mäntylä 2017). All in all, 13 articles were written about the case company between September 2016 and February 2017 (Table 4). The media publicity had an impact on the case company's sales as it got many leads thanks to the articles.

### 4.3.3 Lead generation and sales

The case company created its first marketing offer (a guide) during the summer of 2016 and published it on the company website in August. The guide is available to be downloaded for free on a landing page. CTA buttons directed to that landing page can be found on the company website's front page and within blog posts. The goal for creating the guide was to educate people about an important topic relating to the company's solution and to generate leads. If a contact wants to download the guide, he needs to fill a form with his contact information (email address). This contact information is automatically logged into the database in HubSpot. It will also change contact's life cycle stage to MQL (marketing qualified lead) if the contact does not yet exist in the company's database. When the form is filled, the MQL is directed to another landing page that allows him to download the guide. He also gets an email that includes the guide, so it can be accessed later as well.

The gathered contact information is used for sending marketing information. For instance, 7 days after the guide is downloaded, the MQL gets an email that recommends to request a demo. Moreover, the MQL will start to receive the company newsletter every month. The process of generating leads with the guide is showcased in Figure 7.



*Figure 7 The lead generation process with a marketing offer (a downloadable guide)*

In 2016, the guide was downloaded 53 times. The number of downloads increased significantly in the beginning of 2017. The guide was downloaded 35 times in January and 34 times in February. In total, the guide was downloaded 122 times between September 2016 and February 2017 (Table 5).

The case company created its first landing page for demo requests in August 2016. On the page, there is a form that contacts can fill up. The contact information is automatically logged into the database in HubSpot. It also changes contact's life cycle stage to SQL (sales qualified lead). Immediately after the form is filled, the SQL gets an automated email that thanks him for requesting the demo. Subsequently, the SQL is contacted by a salesperson soon after the demo is requested. An online or face-to-face meeting is agreed with the SQL. This lead generation process with the demo requests is presented in Figure 8.



Figure 8 The lead generation process with demo request

Figure 9 presents the general lead generation process in the company, including the different life cycle stages. The contact can move forward in the process going through all the steps or the process can start from any step on the way and skip the previous stages. Nonetheless, the contact can also go backwards in the process. For example, a customer can download a guide. It is noteworthy that the life cycle stage will not change backwards so if the person is already a customer, he does not become a MQL even though he downloads the guide.

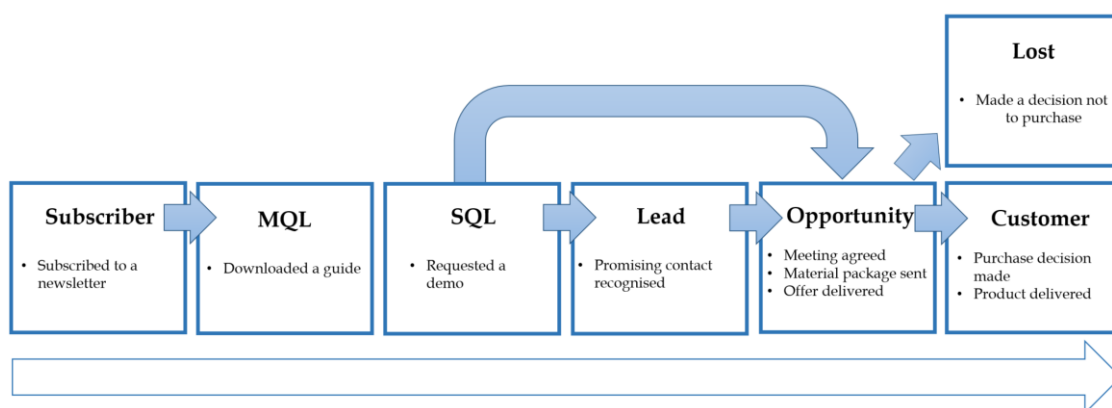


Figure 9 The general lead generation process of the case company

As mentioned, the process can vary greatly. One ideal option (Figure 9) goes as follows: 1) a website visitors subscribes to a newsletter (he becomes a subscriber), 2) subscriber downloads a guide that is highlighted in the newsletter he has received (he becomes a MQL), 3) MQL requests a demo after receiving a marketing email that underlines the opportunity to request the demo (he becomes a SQL), 4) a salesperson contacts the SQL and agrees a meeting with him, sends material package and delivers an offer (he becomes an opportunity), and 5) the opportunity decides to buy the product (he becomes a customer). This process can also lead to contact being lost if the opportunity decides not to purchase the product. When this happens, the contact is either erased from the database or manually changed back to a subscriber.

This above-described process starts from the inbound marketing activities. Nevertheless, the process can also start from the middle when an outbound sales

method is fostered. In the case company, this process (Figure 9) can go as follows: 1) a promising contact is recognized e.g. by meeting the person in an event and his contact information is added to the database (he becomes a lead), 2) the lead is contacted and a meeting agreed with him, material package sent and an offer delivered (he becomes an opportunity), and 3) the opportunity decides to buy the product (he becomes a customer) or he decided not to buy the product (the contact is lost).

After using the marketing automation system for 1,5 months, only four persons had requested the demo. In September 2016, the appearance of the landing page was changed to look more attractive and the form was made simpler. First it was necessary to type a first name, surname, email address, phone number, company and job title. This was changed in a way that the contact only needs to type an email address. After these alterations, the conversion rate amplified and in total 24 demo requests were conducted during the year of 2016. However, not all the sales qualified leads were relevant or potential clients for the company. Some of them had not given a proper email address or they never responded when they were contacted. Besides, some of the SQLs were competitors, journalists and potential partners. Therefore, the demo requests did not lead to as many meetings as there were requests.

*Table 5 The number of leads generated by the case company*

	<b>Guide downloads</b>	<b>Demo requests</b>	<b>Newsletter subscriptions</b>
<b>September 2016</b>	4	3	
<b>October 2016</b>	14	4	
<b>November 2016</b>	20	10	
<b>December 2016</b>	15	13	
<b>January 2016</b>	35	20	16
<b>February 2017</b>	34	22	16
<b>Total</b>	<b>122</b>	<b>72</b>	<b>32</b>

To avoid getting leads who are not relevant, the company changed the lead generation form in the middle of February 2017 in a way that only business emails are accepted. This means that in example, Gmail accounts and other free email clients cannot be used to request a demo. However, the guide can still be downloaded with any email client.

All in all, 72 demo requests were generated between September 2016 and February 2017. The case company considered it as a good number even though there had been problems with getting irrelevant leads. It would have been good to have even more leads but the number achieved was reasonable compared to

the effort put into the marketing activities. Besides, the employees estimated that the number of leads would keep increasing in the future.

*"I was positively surprised about the amount of leads we have received. However, not all of them have been relevant for us. There have been competitors and people who do not respond. Overall, it is great that we have a lot of contacts and we are communicating with them. I have high hopes that the results will get better in the future."* **Co-Founder**

#### **4.3.4 The successfulness of the implementation process**

Despite the difficulties faced during the implementation process, the employees consider the implementation process to be successful as a whole. Nevertheless, numerical goals were not set in the beginning so it cannot be reviewed if they are attained. The system could have been more in use but still, positive results have been obtained.

*"We did not set any numerical goals so it cannot be said the goals have been reached. Overall, I am content with the implementation process. We are getting leads and the system helps us in our campaigns and monitoring the results."* **CEO**

*"I was not aware of any concrete goals but I think the system has been useful for us."* **Solution Designer**

The employees are happy with how much the number of social media followers, website visitors and leads have grown. Even though the company has been busy with its product development and other key functions, it has made progress in marketing.

*"I have been surprised to see how much the number of visitors on our website has grown. It shows that we are doing something right. We did not have numerical goals but the growth in our KPIs has been good."* **CTO**

*"We are headed to a right direction and with good speed. A lot has happened already in six months."* **Sales Manager 2**

Even though the employees consider the implementation to gone mostly well, there are still several things that could have been done better with the process. Firstly, the implementation process should have been planned more precisely in the beginning.

*"We could have made better instructions in the beginning and plan the process better so everyone knows what is expected from them. However, it has been difficult because we have not been able to forecast the future and our surroundings change all the time."* **Customer Success Manager**

Secondly, more content should have been produced. The company has increased the number of blog posts in a month but still it has only one downloadable guide. Furthermore, HubSpot offers features, such as lead nurturing based on buyer personas, that could have been used more efficiently.

*"I would have anticipated we had used the system more widely, such as have more downloadable content and nurturing patterns. Still, we have reached our goals partly. We might have been able to get better conversations if we had used more nurturing and different methods to approach our leads."* **Marketing Director**

*"We could have done more and taken more advantage of the system, for example by utilising buyer personas."* **CEO**

The Marketing Director considers that the value received from the system has been good compared to the price paid. If the full price would have been disbursed, the company should have been able to receive more value out of the system.

*"If we would have paid the full price of the system, this would not have been a successful implementation because compared to that amount of money, we have not gained enough value from the system."* **Marketing Director**

Since the company is a start-up, it is always going through changes and in many cases, common practices are not yet well established. Moreover, there has not been enough time to invest in marketing because other things, such as R&D have been the priority in the organization.

*"Time and lack of resources have been an issue."* **Solution Designer**

*"We are a start-up and we have too many things going on at the same time. We have difficulties in estimating how much time different activities take from us."* **Sales Manager 2**

*"There is always 'something better to do' than write a blog for example. Other things as sales and R&D take the priority. Maybe if would have got even better results, such as clients directly through marketing, we would be more enthusiastic to use time in it."* **Co-Founder**

Lack of experience and the fact that the case company did not have similar systems before have also been an issue. The implementation process could have been smoother if the employees would have had experience of such systems. In that case, it would not have taken so much time from the employees to learn to use the system properly and make it into a routine.

*"We had employees working with a system like that pretty much for the first time in their life, so it has taken time from them to learn to use it. If we would have had someone on board who has more experience of the system, it might have speeded up the process. We*



*have also been focusing on product development so we have not been able to concentrate on marketing as much as would have been needed."* **CEO**

*"In the beginning, it was difficult to remember to do all the actions that require manual work. Thus, making the usage into a routine has been slowing us."* **Customer Success Manager**

Overall, the sales persons had more problems in using HubSpot than employees using the solution for marketing. This was harmful because if the CRM database is not up-to-date, it also affects the marketing activities.

*"I think the implementation process has been successful considering the marketing part. Regarding CRM and sales, we have had challenges with the manual work."* **Co-Founder**

*"I see development opportunities in the internal usage as the CRM part should be used more actively. It is important that CRM and marketing automation work seamlessly together. We need to alter the usage now when we are getting more customers. For instance, we should not send the same messages to leads and customer."* **Sales Manager 2**

While being a start-up has made the implementation process problematic for the case company, it has also had a positive effect. The hierarchy in the company is low and the decision-making process is normally rather fast. The system owner had the possibility to work independently and make quick decisions during the process, which was beneficial in terms of the speed of progress in the implementation process. Besides, not having any previous marketing automation and CRM system saved the company the time from having to make any integrations. Starting to use HubSpot was therefore relatively simple.

*"We are a start-up and we do not have the same problems as corporations have. We can make changes in our organization quickly and alter our activities when the understanding of the market and customers grows. We do neither have multiple systems and a need for complex integrations."* **Sales Manager 2**

The Co-Founder considers it positive that the marketing team is small. With a bigger organization, there are inevitably more problems in communication with the team. In the case company, there was not any change resistance towards using the system, which facilitated the implementation process.

*"All employees have had positive attitude towards the new system so there has not been any change resistance. Everyone wants to learn how to use the system and make it part of their everyday work. Besides, we are used to using different cloud services so it has been natural for us to implement the marketing automation system as well."* **Customer Success Manager**

*"People are motivated to use the system. It is always about the people, not about the tools. All employees have been willing to follow the common rules and not wanted to stubbornly do what they want."* **Solution Designer**

It was also a positive factor in the implementation process that there was an opportunity for the system owner to participate in a training. She learned a lot in the training and thus, received a good amount of relevant knowledge straight in the beginning. Moreover, there was positive support from the management and all employees, and the system owner was systematic in her actions.

*"It was positive that the system owner participated in the training and has used time to learn to use the system properly. Also, support from management and from all employees has been excellent."* **Marketing Director**

*"The owner of the system has been systematic with the implementation process. It has aided the implementation significantly."* **CEO**

The implementation process taught the employees many technical skills and how to use the system efficiently. It also changed employees' attitudes towards marketing automation system and marketing overall.

*"This process has changed my opinion for marketing; I used to think that marketing is a nice-to-have. Now I consider that marketing automation can act as a sales person or a sales team, and get as many leads."* **Co-Founder**

The expectations were too high in the beginning and results were expected to be received right away. The implementation process taught what is needed to use the marketing automation system efficiently. In example, a company needs to produce enough relevant content to be able to use a marketing automation system successfully. Additionally, enough resources need to be allocated to marketing.

*"It has been slower and more laborious process than I had anticipated. I have learned that we need to be patient and understand that the reward does not come immediately but it will come in the end. In this project, we did not see any results during the first months but now we are seeing that the results are getting more and more positive. Systematic way of working has clearly paid off."* **CEO**

*"We have not had enough resources for this project and external service providers are too expensive. The system is not the reason why the implementation process has not been as successful as it could have been. It is about the content and learning about sharing it."* **Marketing Director**

The case company decided to use the marketing automation system after the implementation process ends. The company had a significant discount for the first year of usage and that ended in the end of March 2017. There will be a

minor discount for the second year and the third year will go according to normal pricing.

*"At least during the time, we have the start-up discount, we are going to use the system. We just need to use the system more comprehensively to get value for our money."*

**Marketing Director**

*"At least the next year we will continue the usage. The normal price is quite expensive. If we get as much leads by using the system as we would get by cold calling in example, it is worth investing in it. We need to consider the profits."* **Co-Founder**

It cannot be confirmed yet if the system will be used after the second-year ends. The normal price is considered to be expensive and it should not be paid if the system does not produce more value for the company or there are not enough resources to use in marketing. Besides, there is also a supplementary price that needs to be paid for the additional contacts in the database. If the company will get more leads, the usage of the system will cost more for the company. All in all, the company desires to keep using the system when the normal pricing starts; it only necessitates that more value will be gained. In the future, the company will try to use the system more comprehensively to reach the goals.

*"We will continue the usage if we can afford it. If we go to a new market and have more contacts, the usage will become more expensive for us. I don't know if we can afford the system then."* **Sales Manager 2**

*"We would be crazy if we would not continue using the system. We are just now able to see the benefits of using it. Thus, if we would need to pay the full price, we would need to think again."* **CEO**

#### **4.4 Summary of research findings**

When the case company adopted the marketing automation software, it did not make a detailed plan or set up common, numerical goals for the implementation process. HubSpot was chosen without comparing it to other systems or considering the long-term effects of using the solution. The employees estimated that the system would help in automating marketing activities, creating brand awareness and generating leads. A new employee who started in the company after the system was already acquired, was chosen to be the system owner. Therefore, she took the main responsibility to implement the system. As she or no other person in the case company had experience of implementing such systems, it took some time to learn. However, the implementation process was aided by offering training for the system owner and by getting support from the management.

The case company struggled with the implementation in the beginning as it could not prioritise the project. It was going through many changes with

personnel, brand image and product, which took time from marketing activities. Yet, one of the biggest issues the company had with the implementation, was a lack of content. The company was not able to invest time in writing the content because there were so much many other things to do with product development, sales and other activities. As the company is a start-up it did neither have a budget to spend to buy the content from an external service provider. When the case company adopted HubSpot, it did not yet have a blog or strong social media presence. Therefore, the implementation commenced properly only when the company began to publish a blog regularly and created its first downloadable content. About the same time, the company started to invest in its social media channels and in targeting to get media publicity.

The communication between the employees was mostly efficient during the implementation process, and also marketing and sales worked smoothly in co-operation. However, there should have been more communication about the progress with the implementation of the marketing automation system and overall about the marketing performance. As the management was not sure if the marketing automation system had been useful or the marketing performed well, it did not consider it important to invest more resources in marketing. The expectations set up for the implementation process were also relatively high. Furthermore, there was not clear evaluation process set up for the process and the results were not monitored regularly.

All in all, the case company succeeded in growing its number of social media followers and website visitors significantly. Moreover, a respectable number of leads were generated during the implementation process. The results were also improving every month. Even though, all employees agreed that the company could have used the marketing automation system more extensively, they were mostly content with the results. The system had helped the case company to steer the marketing activities in the right direction, and along with the lead generation, the system helped in improving brand awareness. Moreover, when the results were demonstrated for the management, it changed their attitude towards marketing, and they decided to invest more time in marketing in the future.

#### **4.4.1 The factors influencing the implementation**

The goal of this study was to increase the understanding of successful adoption and implementation of a marketing automation system. This attempt was supported by exploring additional research questions, such as what kinds of impediments and facilitators can occur in the adoption and implementation of a marketing automation system and what are the perceived benefits of implementing a marketing automation system. In this study, several factors were recognised and benefits discovered.

Impediments and facilitators in the implementation of a marketing automation system in the case company are presented in Figure 10. The figure is adapted from the model created by Honeycutt et al. (2005). In their model (Figure 3) impediments to Sales force automation were identified in three different

phases: planning, communication and evaluation. Their figure shows also the impacts and outcomes of the impediments to the sales force. In this research, similar three stages are utilised to categorise the impediments and facilitators to the adoption and implementation of a marketing automation system. Furthermore, impact of these factors on the employees and outcomes in the organisation are recognised.

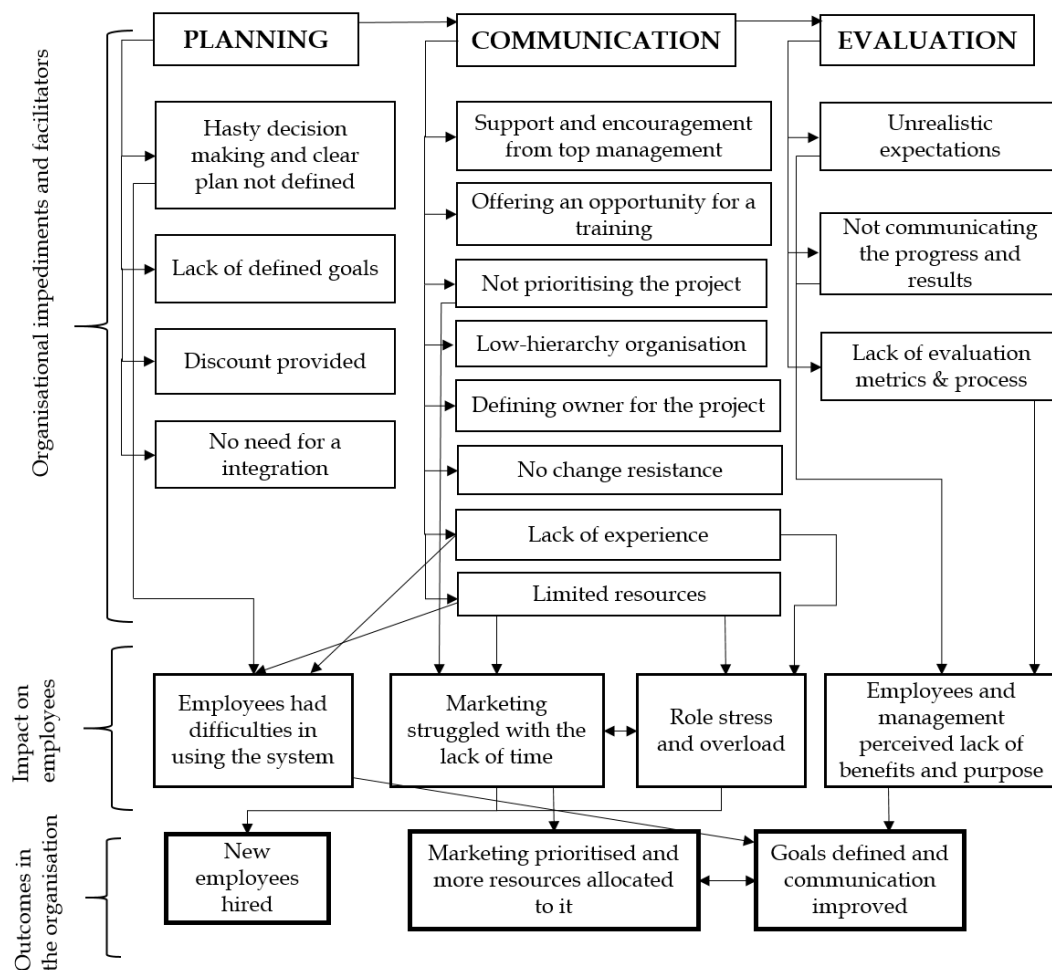


Figure 10 Impediments and facilitators in the adoption and implementation of a marketing automation system in the case company

The case company made a few mistakes already in the planning phase. The decision to acquire the marketing automation system was made rather fast and there was no clear plan set up for the implementation process. The purchase decision was made easily since the marketing automation system provider offered a significant discount for the case company. Furthermore, the decision was aided by the fact that the company did not have a CRM or marketing automation system before HubSpot was acquired. Therefore, it did not need time to figure out any major integrations. Importing existing contacts from

spreadsheets was an easy task to do so that did not make the adoption of the marketing automation system difficult.

Since the decision was made quickly, goals were not defined in sufficient detail. This made it unclear for the employees what is the purpose of using the system. In the beginning, only a rough estimate of the goals was made. Marketing automation was supposed to help to create brand awareness, generate leads, and boost sales. This goal was not considered to be sufficient, and more detailed definition and plan for the implementation should have been made already at the time when the system was adopted.

A few reasons why a plan was not made in the beginning, was that the main persons using the system started in the company as new employees after the system was already acquired. Therefore, they were not able to participate in the decision making and the implementation was delayed. Owner for the system and the implementation process was defined clearly which facilitated the implementation. However, she did not have experience of such projects so it took time to learn. The learning was positively supported from the top management level and a training course offered. This had a substantial impact on the implementation process as the system owner learned to use the system properly during the training.

In the beginning, some of the employees felt that it was difficult to use the system. Sales force in particular had problems in making the usage into a routine. This was mostly due to the lack of experience and not having enough time to familiarize themselves with the system. The owner of system should have also educated the team better about the logic of the system. Even though the company faced some difficulties in using the system, there was no change resistance towards the system. Moreover, all employees were motivated to learn to use the system.

The main impediments in the whole implementation process are related to the lack of resources and not prioritising the project. The company was going on tremendous changes during the first half of the implementation process and they required a lot of time from all employees. During the first half of the implementation process, it was not possible to invest enough time in the project and marketing overall. For example, the amount of content created by the case company was insufficient to have been able to use the system properly. At the time, resources were limited and new employees could not be hired. This made employees working in marketing struggle with time. Moreover, the busyness and inability to invest enough time in the implementation process caused some anxiety and stress.

Since the case company is a start-up, it has a small number of employees and low-hierarchy. Therefore, the company could make quick decisions. The owner of the system also had a free hand to implement different marketing activities. This facilitated the implementation process significantly. The communication could have been more efficient in the case company regarding the implementation process. Lack of resources and experience were the biggest reason why the communication was not as fluent as it could have been. Nevertheless, there were no conflicts between the employees and in example, the

co-operation between sales and marketing was smooth. All in all, the communication internally was not totally unsuccessful even though it could have been more efficient.

The case company faced a few impediments also in the evaluation phase. First of all, a few employees had unrealistic expectations towards the implementation process. The marketing automation system was expected to generate leads but it was not realised how much work it takes to use the system properly and get other marketing activities to support it. Besides, during the first half of the implementation process, evaluation metrics were not utilised as efficiently as possible. The number of social media followers and website visitors were regularly checked. Nevertheless, more detailed monitoring should have been done related to lead generation. Because the results of the marketing activities were not followed and reported in detail, they were neither communicated to the management and all employees in the organisation. This made it difficult for them and especially for the top management to be aware of the results and successfulness of the implementation process.

The implementation of the marketing automation system improved when new employees were hired in the company. This made it possible for the marketing team to allocate more time to marketing and especially to the content production. Goals were also defined more in detail and results started to be monitored regularly. Moreover, the metrics and data were reported and presented for the entire team. Seeing the results of the marketing activities made the top management to realise the benefits of investing in marketing. Therefore, more emphasis was planned to put into marketing in the future.

#### **4.4.2 The outcomes of the implementation**

One of the research questions was to determine what are the perceived benefits of implementing a marketing automation system. Overall, the implementation process can be seen to have mainly succeeded. There were difficulties during the process but the outcomes of the implementation process were positive. The use of marketing automation system was considered useful and the main perceived benefits were the enhanced brand awareness and the number of leads generated.

Considering the company's capabilities, the goals set for the marketing automation system were overestimated in the beginning. Hence, they were altered when better understanding over the marketing automation system functionalities and company's own capabilities were realised. The system was supposed to help in bringing more sales but it was later realised that the system cannot do it alone. The system can help in collecting leads but it is not a tool for closing sales. Salespersons still have an important job in making this happen. This applies especially with the case company since it does not have a web shop in which its product can be purchased directly. Purchases needs to be done through sales force.

The case company generated leads by using the marketing automation system. By using two methods to gather the contact information (1. Download guide and 2. Request a demo), it found relevant leads and could arrange meetings

with them. Not all leads were relevant for the company but still, the case company managed to get the interest of even big corporations and gather extremely valuable leads. Getting those kinds of leads with traditional methods, such as outbound sales, would have been difficult and expensive, or even impossible in some cases. Overall, the number of the leads was decent but still, bigger number would have been better. However, the number of leads was growing each month so it gave hope of getting more and more leads in the future.

The use of marketing automation system helped the company to create brand awareness which can be demonstrated by evaluating the social media publicity and website traffic. By automating social media posts, the number of followers of the case company increased. Certainly, there are other factors affecting the growth but the automation assisted significantly. The growth in Twitter followers was respectable compared to the competitors. Furthermore, publishing in social media directed traffic to the company website. The number of website visitors grew each month and marketing automation system helped in achieving it.

Overall, the results of marketing were considered positive and marketing automation to have helped in making it happen. This conclusion led to marketing being set as one of the top priorities in the organisation. The company decided to invest more time in marketing, e.g. by making all employees participate in content creation. Moreover, the company saw so much potential in growing the impact of marketing that it could decrease the amount of resources used for outbound sales and increase the amount of inbound sales and marketing.



## 5 DISCUSSION

### 5.1 Theoretical contributions

This study makes four theoretical contributions. First, there are many similarities between the implementation processes of a marketing automation system and other ICT systems, such as CRM and SFA. As a whole, the processes resemble each other greatly. Factors affecting the adoption of a CRM system, such as an existing ICT infrastructure, a need for integration, change capability and cost (King & Burgess 2008; Alshawhi et al. 2011) were also found to be important in the adoption of a marketing automation system. Moreover, in the case company, low price, no need for integrations and capability to adopt quick changes, were one of the main facilitators.

In line with the studies of the implementation of SFA (Rasmusson 1999; Erffmeyer & Johnson 2001; Speier & Venkatesh 2002), also in the implementation of a marketing automation system it is important to define goals for the project. Furthermore, there seems not to be difference between the systems in how important training, encouragement and organizational leadership are for the success of the implementation processes. In this research was discovered that the training offered for the owner of the system facilitated the implementation process significantly. Yet, the role of the system owner was emphasized in this research more than in studies conducted about the adoption and implementation of SFA and CRM.

Second, one essential factor that differs the implementation of marketing automation system of the implementation of a CRM or SFA systems is content. This study suggests that having a sufficient amount of interesting and relevant content is essential for implementing a marketing automation successfully. In the implementation of a CRM or a SFA system, having content has not been proved to be important. However, the successfulness of CRM and SFA has found to be more up to the organisation capabilities than individual product features. Also in this study, one of the main conclusions is that the successfulness of the implementation process is not as much dependent on the system than it is reliant on the organization, and its management and employees.

In line with Järvinen and Taiminen (2016), implementation of content marketing tactics take time and financial resources. This requires patience from the company, and it is crucial to understand that the implementation cannot be established overnight. Since marketing automation is so deeply connected with content marketing, implementing a marketing automation system takes time if the company does not have a deep-rooted content marketing approach. Thus, marketing automation system should not be adopted until the company has a capability to produce enough content. Even then, with sufficient resources, it can take time to learn what the leads are interested in, and therefore, how to produce interesting and relevant content.

Third, there was not found to be change resistance towards the implementation of the marketing automation system. The employees in the case company considered the project more as an opportunity to learn something new than as a disturbance for their work. The previous research has however identified that change resistance is one of the main impediments for technical implementations (e.g. Gohmann et al. 2005; Barker et al. 2009). Even though there was no change resistance towards the marketing automation system in the case company, it cannot be indubitably implied that the change resistance could not be an impediment for the implementation of a marketing automation system in some other organisation. The case company is a small, modern organisation which do not have the burden of being in stuck with old ways of working. Therefore, the case company is likely to be more receptive to new ideas and methods than older corporation. Furthermore, there is potentially a difference between sales and marketing employees. In example, Honeycutt et al. (2005) found that the employees resisted the SFA system because of the fear of losing their position by giving up knowledge of customers. This is not as likely to happen with employees working in marketing as their wage is not usually dependent on generating sales.

Honeycutt et al. (2005) discovered that the lack of and poorly defined evaluation metrics are common impediments for a successful implementation of SFA. This study confirms that the evaluation metrics are extremely important in the implementation of a marketing automation as they are in the implementation of CRM and SFA. As a fourth contribution, this research emphasizes that the implementation project should be monitored systematically and regularly, and the progress and results need to be communicated inside the company. This is extremely important for affecting the opinions of the employees about the benefits of implementing the system.

Speier and Venkatesh (2002) have found it to be harmful for the SFA implementation that salespeople do not understand the benefits of the system for the organisation and for their own work. Yet, in this study, it was even more significant that especially the management understands that the system is valuable for the company. If the management does not see the benefits, it will not support the project, and this can end up ruining the entire implementation process.

All in all, the adoption and implementation of marketing automation system and other ICT systems, such as CRM or SFA, are very similar. Furthermore, company planning to implement one of these systems, can expect to face similar impediments and facilitators. The factors affecting the implementation process vary mostly due to the company size and culture. Planning, communication and evaluation are important in all these processes. Nevertheless, the biggest difference in comparing marketing automation system implementation to other ICT implementations concerns the need for content creation.

## 5.2 Managerial implications

Managerial purpose of this study was to increase the understanding of successful adoption and implementation of a marketing automation system by identifying different factors affecting the implementation. This goal was achieved by interviewing employees in the case company and making observations throughout the implementation process. Collected data was analysed, and several impediments and facilitators to the adoption and implementation of a marketing automation system were recognised. Moreover, guidelines for implementing a marketing automation system successfully were created based on the results in this case study (Figure 11).

Based on the analysis, it can be deduced that planning and communication are extremely important for making the implementation successful. The decision to purchase a marketing automation system should not be done hastily. It is important to consider if the company is in a right position to start to use marketing automation system, and especially if it does not yet have a similar system in use. The case company acquired the marketing automation system too early because it did not have capabilities to use it efficiently. To get real benefits out of using the system, the company needs to be capable of investing time in marketing and especially in content production. There is no use of marketing automation system if the company does not have content. Moreover, if no paid advertising is not used or content published, the company website and landing pages do not attract enough visitors. This applies to start-up companies, in particular because the most often, they do not have a known brand that would attract interest without any marketing activities.

If a company comes to a decision that marketing automation system can be acquired, a comparison between different system providers should be made. The case company got a significant discount from HubSpot for one year so other systems were not even considered. Nonetheless, more research of the options should have been made. Even though a company receives a discount for a certain time, it needs to consider what will happen after this period. The normal price may be too expensive and changing the system after the discount period ends may cause difficulties. Time and money has been invested in learning to use the system and these benefits will be lost if a company changes to other system.

To make the implementation of a marketing automation system successful, it is vital to make a clear plan for the implementation process. Also, goals need to be defined in detail. It is beneficial if employees who the marketing automation system concerns, could participate in defining the goals. Furthermore, the goals need to be communicated with the whole organisation so everyone is aware of them and what is their role in the process. An owner for the system needs to be decided and she/he needs to have the knowledge of how to use the system properly. If he lacks experience or knowledge, sufficient training should be offered.

Support and encouragement from top management are important in getting the project prioritised in the company. If the management realises the importance of the project and the benefits of using the marketing automation system, it will aid the implementation process. Therefore, the owner of the system has an important role in ensuring that the top management is aware of why resources need to be invested in the implementation. The owner is also in a crucial position in taking care of the communication inside the organisation. To make the implementation process successful, unrealistic expectations need to be avoided. This can be pursued by setting the goals on a realistic level and ensuring they are understood correctly in the organisation. If the expectations are too high, the employees will be inevitably disappointed with the results. This is extremely harmful since the whole project may seem unsuccessful even though it would not be.

Evaluation metrics and process should be established already during the implementation process. The key metrics of the system performance should be monitored regularly and data gathered. Consequently, the data can be utilised for improving the implementation process and the use of the marketing automation system. By keeping track of how the marketing automation system is performing in relation to the objectives, the system owner can be sure that the process is going to a right direction. Furthermore, the data helps in ensuring the top management of the usefulness of using the system. Therefore, this study bolsters the finding of Järvinen and Karjaluo (2015) that a company needs not to have only a manageable metrics system but also a process that encourages the effective use of the metrics. There is no use of the metrics if they are not regularly monitored and the findings harnessed for improvements.

Planning	1. Consider the company capabilities to implement the system and use it expeditiously.
	2. Compare different system providers and choose the most suitable one for your company. Consider the long term.
	3. Make a clear plan for the implementation process and define goals in detail.
Communication	4. Choose a system owner and enable training if needed.
	5. Get support and encouragement from top management.
	6. Prioritise the project and ensure required resources.
	7. Communicate efficiently throughout the project and prevent the emergence of unrealistic expectations.
Evaluation	8. Establish evaluation metrics and process already in the beginning of the project.
	9. Keep on track of the metrics, and collect and analyse the data regularly.
	10. Communicate the results in the organisation.

*Figure 11 Guidelines for implementing a marketing automation system successfully*

One of the most important learnings in this research was realising that a marketing automation system does not solve anything on its own. The successfulness of the project is dependent on the organisation capabilities and the employees. All events inside the company affect the implementation process. Furthermore, the successfulness of the implementation of a marketing automation system is highly dependent on the overall marketing and sales performance in the organisation.

One key findings in this research was that if a marketing employees fails to produce interesting and relevant content, there is not much of a use of a marketing automation system. A company needs to have a capability to invest in marketing either by using manpower to produce and share content efficiently or use paid advertising. Furthermore, the case company underestimated the time and resources to implement the marketing automation system successfully.

In line with Heimbach et al. (2015), companies could benefit by having self-learning systems and therefore, even more automation than there is now available. Still today the usage of marketing automation system requires a lot of manual work to be done; at least the marketing automation software chosen by the case company was not as advanced as would have been beneficial. Therefore, companies planning to adopt a marketing automaton system, should compare different software providers carefully to find the most suitable one and consider that the implementation will take time.

Similarly, the marketing automation does not close any deals on its own and in the end, it is still up to the sales force to be able to make the deal. Especially in B2B business when customers cannot make a purchase independently online, salespersons have the responsibility to close the deal. In this case, marketing automation only helps in generating leads, and marketing and sales need to work tightly together. The mission of marketing can be to generate and nurture leads, and sales continue from there.

Based on this research, it can be construed that the use of marketing automation system can feel unsuccessful if the leads are not converted into customers. This applies especially when company's goals are mainly related to producing sales. Therefore, both marketing and sales need to perform well to make the implementation of a marketing automation successful. It is also adverse for the implementation of a marketing automation system if a CRM system is not properly used. Marketing messages may be sent to wrong people, for instance. Consequently, the co-operation between marketing and sales is crucial.

The purpose of this research was not to focus on CRM but as it is connected to the marketing automation system and they share the same database, it inevitably became part of the study. Järvinen and Taiminen (2016) found in their study that it was problematic that sales representatives had to manually record won or lost deals into the CRM system. The case company faced the same problem as not every action could be automated. Maintaining the data storage up-to-date requires a tremendous effort from the employees working in sales. Each meeting and phone call with a contact must be documented to the system manually.

Moreover, this study confirms the finding of Järvinen and Taiminen (2016) about the importance of seamless cooperation between marketing and sales departments. They found that content marketing cannot be successfully integrated with B2B sales processes, and this study supports the finding by adding that a successful implementation of a marketing automation also requires marketing and sales working closely together and towards common goals.

### **5.3 Evaluation of the study**

The goal of this research was to increase the understanding of how a marketing automation can be successfully implemented by identifying factors affecting the implementation process. This attempt was attained by following case study method and action research strategy. Accordingly, this study provides valuable knowledge for companies planning to invest in marketing automation and for ICT software providers in developing their activities.

The findings of this research should be interpreted in the light of certain limitations. First, because this is a case study, the results are limited by the study context. Therefore, the findings are not generalizable. The case company has its own company culture, history and organisational structure. These factors have inevitably affected the research. Moreover, during the implementation process

the case company had its own specific conditions in which it was facing constant changes and struggling with lack of resources, for instance.

Second, the case company is a rather small company so the results cannot be generalized to companies of all sizes. In addition to being a small organisation, the start-up context did affect the implementation process. The company acquired a marketing automation system for the first time and was lacking the experience of implementing such systems. Besides, the research focused only on one company in one specific country, Finland. Therefore, based on this study, it cannot be deduced if the results apply to all regions and markets.

Case study as a research method and action research as a research strategy were natural choices for this study since the researcher was working in the case company. Even though these choices limited the research to only one company, they at the same enabled the researcher to gather in-depth information. She had an opportunity to explore the factors affecting the implementation process more thoroughly than it would have been possible as an external researcher or if focusing on multiple companies at the same time. She was able to gather real time information during 10 months by observing and monitoring the marketing and sales performance. Therefore, one of the greatest assets of this study is that the research time was long so the researcher could recognise the outcomes of implementing the marketing automation system.

A qualitative researcher is never totally objective and her choices unavoidably affect the study. However, in this research the researcher tried to be as objective as possible when making observations and interviews. This study is different comparing to many other studies under the action research strategy in a sense that the researcher was not only working in the company but she was also the system owner. Therefore, she had the responsibility to assure that the marketing automation system is implemented successfully. It is noteworthy that conducting this research has slightly advanced the implementation process because the researcher has used also her free time in deliberating the process of how a marketing automation system can be implemented successfully. However, the researcher has been motivated to invest in the implementation process due to her role as an employee and not because of the role of a researcher.

Even though the terms reliability and validity are mostly associated with quantitative studies, they can be extended to this qualitative study to a certain extent. According to Yin (2003, p. 37) the reliability signifies the repeatability of the research. So, if someone would replicate the same study with the same procedures, the later researcher should attain the same findings. In this study, the researcher made detailed notes during the implementation process so the research could be easily repeated in some other context. However, since the interviews followed a semi-structural approach, in the interview, the researcher asked additional questions based on the answers of the interviewees. Therefore, the interviews could vary in different organizations. Also, another researcher could have dissimilar way of communicating which could have an impact on the interviews.

Generally, validity denotes how well the conclusions drawn in research explain what has happened (Eriksson & Kovalainen 2008). As this is a case study

conducted as an action research, and the focus was only in one company, the results are not generalizable. However, the findings are justified with the data from observations, interviews and marketing performance metrics. Therefore, it can be deduced that the findings are accurate for this case and they provide a promising avenue for the future research.

Overall, this research has attained the objectives set. Impediments and facilitators to the adoption and implementation of a marketing automation system were recognized and thus, categorized based on the framework created by Honeycutt et al. (2005). Moreover, the impact of these factors on the successfulness of the implementation process was explored further. The implementation process was observed during ten months and different phases of the process were identified.

By analyzing the identified impediments, facilitators and outcomes, guidelines for a successful adoption and implementation of a marketing automation system were created. The guidelines are useful especially for organizations that do not have experience with implementing a marketing automation system. However, as the implementation processes of CRM, SFA and marketing automation seem to be very alike, the guidelines presented in this study can also be adapted to the implementations of other ICT systems.

All in all, this study brought new insight into the marketing automation research that is still very slim. Moreover, this study provided interesting information about the implementation of a marketing automation system in a start-up company and marketing and sales practices related to content creation, social media and lead generation. Lastly, this study provides valuable knowledge for ICT system providers as there are several impediments in the implementation process that are not related only to the product features. Therefore, the system providers can improve their actions, such as sales process and customer support function based on these findings.

## **5.4 Suggestions for further research**

Along with being a useful study for companies investing in marketing automation and ICT providers, this research provides promising avenues for future research. As this was a single case study in one company, the results cannot be generalized to large extent; more research is needed about the adoption and implementation of a marketing automation systems overall.

Since this study is limited by focusing only on one start-up with a specific company culture and ways of working, it would be beneficial to execute similar studies in different types of organisations in the future. Moreover, it should be explored if the factors affecting the implementation process vary between different sized organisations and how big impact the company culture and history have. As an example, in this research, there was not found to be any change resistance towards the implementation process. Considering that the study was focused only on one company that is modern, new and small, more



research on the subject is needed with different types of organisations. Furthermore, the focus of this study was within the B2B sector so it would be interesting to see if there are any differences when investigating the B2C sector.

This study cautiously suggested that the implementation of marketing automation system does not significantly differ from the implementation of a CRM or a SFA system. There seems to be some differences but most of the impediments and facilitators are comparable. As this was only one single case study, the differences between marketing automation system and other ICT systems should be explored more thoroughly. Furthermore, the research could be deepened by gathering more in-depth knowledge of company culture affecting the implementation process. Thus, it should also be investigated if there are differences in how different kinds of employees consider the implementation process. In example, it would be interesting to see if there are any major variances between employees working in marketing and employees working in sales.

At large, marketing automation is a topical subject but it has not been extensively explored in academic research. Therefore, there are plenty of opportunities to study marketing automation. More knowledge is still needed about how different types of companies utilise marketing automation and how it relates to their overall marketing strategy, for instance. Heimbach et al. (2015) have proposed that future studies could address customer reactions to marketing automation activities. This study contributes to this suggestion by identifying the outcomes of implementing the marketing automation system. In example, the number of leads highlight the reactions of the target group. However, no customer survey was made to investigate more thoroughly how customers consider the automated marketing activities. Therefore, the suggestion by Heimbach et al. (2015) is still valid for further research. By identifying the opinions of the customers related to the marketing automation activities, could help companies to learn to be more successful in their marketing and sales activities.

In this research, social media was found to help in directing traffic to the company website and in converting the visitors into leads. The case company invested time in promoting the company through the company social media pages but also by exploiting the employees' accounts. Therefore, this study supports the finding of Karjalainen et al. (2015) that suggests that companies can benefit from employees' activity in social media and that content creation can be affected indirectly by training employees to create desired content. In the future, this subject could be explored more by identifying how companies can utilize employee accounts to promote its content strategically, and furthermore, how marketing automation can help to harness this opportunity.

Overall, this study contributes to previous research on the importance of content marketing in B2B organisations. Järvinen and Taiminen (2016) explored the connection between marketing automation and B2B content marketing. They suggested that future research could explore how marketing automation can be harnessed to create and share content for other key objectives of content marketing than sales. In this study, the case company had goals related to lead generation but also to creating brand awareness. However, the goals were related

more on acquiring new customers than engaging current customer base. Therefore, there is still a need for a research focusing on how a marketing automation system can be utilised for engaging existing customers.

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## APPENDIXES

### Appendix 1 Interview questions, part 1/3

- 1) How well did you know marketing automation before the case company acquired HubSpot?
- 2) Why Marketing automation system was acquired and for what purpose?
- 3) Who made the decision and was your opinion heard?
- 4) What do you see as benefits of a marketing automation system?
- 5) What do you see as risks of a marketing automation system?
- 6) What goals do you have for the implementation of HubSpot?
- 7) What are the difficulties that the case company may face in the implementation of a marketing automation system?
- 8) Who do you think will be mainly responsible for the implementation and usage of HubSpot?
- 9) How much/how often you think you will use HubSpot during next year? What will be your role in the implementation of HubSpot?
- 10) The case company has had HubSpot for about four months now. Are you there where you taught you would be at this point? If not, why? Can you already name something that could have been done better?

## **Appendix 2 Interview questions, part 2/3**

- 1) What has been accomplished with the marketing automation system so far?
- 2) How successful the implementation has been so far?
- 3) Which parts have been especially successful and which not?
- 4) What should be done to improve the implementation and usage of the system?
- 5) How much content have been published? Is it enough? How do you see the quality and relevance of the content?
- 6) How the lead generation process has worked?
- 7) How about social media activities?
- 9) How the cooperation between sales and marketing works in the company?
- 10) Should more resources be invested in marketing?

### **Appendix 3 Interview questions, part 3/3**

- 1) What has been achieved by using the marketing automation system?
- 2) Have the results been what you had expected?
- 3) Have you reached the goals set up for the implementation of the marketing automation system?
- 4) How successful the implementation of the marketing automation system has been in your opinion?
- 5) Which parts have been successful and which not?
- 6) What has facilitated the implementation?
- 7) What could have been done better during the implementation process?
- 8) What has prevented the implementation process of being more successful?
- 9) What has the implementation process taught you?
- 10) Has the usage of marketing automation system enhanced your marketing or sales activities? If yes, how?
- 11) Will you continue using the marketing automation system after the start-up offer ends?