

MARKETING AUTOMATION SUPPORTING SALES

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<p>Abstract</p> <p>The past couple of decades has been a time of major changes in marketing. Digitalization has become a permanent part of marketing and at the same time enabled efficient collection of data. Personalization and customization of content are playing a crucial role in marketing when new customers are acquired. This has also created a need for automation to facilitate the distribution of targeted content. As a result of successful marketing automation more information of the customers is gathered and at the same time, the work of sales force will be facilitated due to a larger amount of information.</p> <p>Marketing automation is used to support sales in modern companies, and specialized companies are also offering these services, which has introduced marketing automation to a wide range of companies. Although marketing automation is already used among companies it has not yet achieved wide academic attention. Thus, the research is attempting to find out how marketing automation works and what are the key elements and benefits when marketing automation is used to support sales. This research also aims to contribute ideas for managerial implications.</p> <p>The research was conducted as a qualitative case study. Interviewees were specialists and representatives of the companies, which were using marketing automation in sales. An abductive approach was taken where both, the existing literature, and empirical findings were used.</p> <p>The study revealed the benefits when marketing automation is used to support sales. The main findings were the improvement in sales lead quality due to the information gathered, sustainment of the customer relationship and increase in brand loyalty. The interviewees saw that usage of marketing automation will increase in the future, and new methods in data collection will make automation even more personalized.</p>	
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ABSTRACT

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1 INTRODUCTION

The field of marketing has drastically changed during the last two decades. Printing press, mailing, TV and audio recordings are losing relevance as mediums when technology and digitalization create new ways to affect people (Cordray, 2014). New developed ways of marketing has enabled both entrepreneurs as well as large corporations to conduct marketing effectively and cost efficiently. Accessibility of inexpensive digital marketing tools has created an environment where a great number of people can be reached without large marketing investments (Lean2Logix, 2013).

The term digital marketing is widely used, inclusive word for marketing among marketing professionals today. Lee Odden from TopRank Online Marketing (2014) interviewed nine top marketing executives to find out the definition of the term digital marketing. The result was that digital marketing leverages the marketing potential and is measurable, thus making the marketing more useful for the people as well as the company. Specialist also mentioned that digital marketing utilizes a wide range of different digital channels to distribute content. Marketing author Dave Chaffey (2015) describes digital marketing as the combination of online channels as marketing channels e.g. web, email, databases, mobile, digital TV and wireless networks.

Digital marketing has evolved to a stage where automation can be done. In the first academic research about marketing automation Buckling, Lehmann and Little (1998) addressed that marketing automation will transform marketing, due to the rise of digital marketing. Transformation of marketing has indeed created a need for marketing automation, and it has become an essential part of digital marketing today. Delivering the compelling content in the right place at the right time requires accurate data correctly processed and transformed into distinct form. By offering compelling content to the right audience will create traffic to the wanted website and throughout the traffic increasing the amount of possible customer as know as leads (Feldman, 2013).

Marketing automation requires sophisticated systems to be executed properly. Thus, customer relationship management (CRM) systems, analytical tools such as Google analytics and different software solutions for building the groundings for marketing automation have become popular and widely used

among companies utilizing digital marketing (Järvinen & Taiminen, 2015). Personalization and customization of content, after information gathering, has become one of the most important parts of interactive marketing strategy, and it is one of the core elements when doing marketing automation today (Montgomery & Smith, 2009). Personalization gives the marketers the signals to allocate the right information to the right person, which enables efficient use of marketing automation. Together with accurate data and evaluation of the customers, timing plays a crucial role when delivering content to the customers automatically. Marketing automation is also a supportive feature for sales, according to Zack Watson (2015). Marketing automation provides high-quality information about the sales opportunities for the salesperson via customer relationship management system. Thus makes the work of the salesperson a lot easier when compared to a call, which is made to an unknown person. (Watson, 2015) Marketo Blog author Sesame Mish (2015) underlines the importance of information provided by the marketing automation. According to Sesame (2015) utilizing leads provided by automated marketing the salespersons are able to monitor real time activities, keep the leads in order, achieve continuous improvement and in the end get the right leads to make the sale.

In Finland marketing automation has grown and major marketing automation companies are already offering their services and support here. Companies such as Hubspot, Eloqua, Marketo, Click Dimensions and Pardot are used across the country. (Suvanto 2015) Although companies are using marketing automation in Finland there are still problems with using the software in a way that automation would provide the right information, and it would be cost efficient. (Niemi-Hakala, 2016) According to Niemi-Hakala, head of marketing in marketing institute, the problems lies on several factors for example in the dialogue between sales and marketing or it is thought that the software will do the work for you and on top of these, the marketers are not concentrating their efforts in the right way. (Niemi-Hakala, 2016)

Marketing automation supporting sales is an interesting topic to study because academic literature is still not fully covering automated marketing but the commercial side is already using automation. (Heimbach, 2015) Large companies such as Hubspot and Eloqua are providing automation systems for the large audience. Finding the combining elements between automated marketing and sales will create a good and coherent study, which will produce valid information and subjects for further studies. B2B and B2C side of businesses are both taken into account in the research, thus the research and literature review will address both. The interviews are executed in both B2B and B2C companies and experts. The result will be given in a general level to be able to reveal linkage between marketing automation and sales, thus it will serve future researchers in the best possible way.

1.1 Research objectives

The objective of the study is to find out how marketing automation works and how does it supports sales. As mentioned above, both B2B and B2C businesses are examined and a model of how marketing automation is supporting both processes are presented. Research is mainly concentrating in creation of the model, which is rather generic than separating both B2B and B2C as a separate models. Marketing automation as a tool for sales is not a widely researched topic among academic researchers. The parts that are needed for executing marketing automation, on the other hand, are considerably studied. The crucial parts such as customer relationship management systems, personalization of customers, content marketing and lead generation are widely researched topics. As an example, the computer-implemented lead scoring system was patented year 2007 by Christopher Golec in the United States.

The dominant situation in the academic research creates a need for more study of the sector of marketing automation as a part of the sales process. Based on the knowledge of the author the academic literature is limited to a small amount of only B2B sector studies (Järvinen and Taiminen, 2015; Pomirleanu, Schinbrowsky, Peltier & Nill, 2013; Rodriguez, Dixon & Peltier, 2014). Academic literature plays an essential role in the research when combining already existing parts of marketing automation literature to the existing knowledge of sales. Theoretical model suggestion of marketing automation from Heimbach, Kostyra, and Hinz (2015) lays the groundings for this research. In addition to academic literature, interviews with three specialists in the marketing automation sector will be utilized, and three companies that are successfully implementing marketing automation are interviewed. Utilizing information from specialists as well as companies, will give the research broader perspective and more tools to create a broad understanding about the benefits of marketing automation in the sales process. The research questions below are formed based on the literature review and initial research made.

RQ1: How is the concept of marketing automation defined?

RQ2: How does the marketing automation process work?

RQ3: How does the marketing automation assist the sales process?

Research questions addressed above provides the necessary information to create a coherent and valid study of marketing automation as a part of the sales process. The study includes all of the crucial parts of marketing automation and sales, and the study can be used in the companies when creating strategies in sales and marketing. Practices presented in the research give valuable information for managerial implications also.

1.2 Structure of the study

The study consists of the five chapters and number of subchapters. Those include an introduction, literature review, research approach and method, findings and in the end, the conclusion. In the introduction chapter research questions and initial information of the research is presented. Literature review starts from the digital marketing and creates the groundings for the whole automation process and how does that support sales. From digital marketing literature review goes to relationship marketing, CRM systems, and all the way to lead generation and in the end to the automated marketing process itself. Finally, based on the literature view and literature of automated marketing supporting sales, a framework of automated marketing process supporting sales is presented by the author.

After the research approach in chapter three, the findings are presented. Interviewees are composed of a combination of experts and companies utilizing marketing automation as a part of their marketing and sales processes. Findings are presented in four chapters and two sub chapters where the whole studied subject is addressed from the interviewees point of views.

In the last chapter, conclusion, all the empirical material is compared to the theoretical material. Similarities and differences are presented as well as the answers to research questions. The chapter also includes managerial implications, which give concrete suggestions for decision makers when considering utilizing marketing automation as a part of their business. The chapter also includes suggestions for further researches.

2 MARKETING AUTOMATION SUPPORTING SALES

If this has been the age of marketing decision support, we foresee that the next two decades will usher in the era of marketing decision automation. In other words, the decisions we can support today are prime candidates to be decisions we can automate tomorrow. (Bucklin et al. 1998)

In chapter two the existing literature is reviewed. All necessary parts of marketing automation are addressed and a broader view of marketing automation is given. The research being about marketing automation and marketing automation supporting sales, thus it is crucial to go through of all the parts that are included in the process when executed. The literature review will start from the parts that automated marketing will need in order to work. At first digital marketing, customer relations management system and lead generation are presented. Then the marketing automation and after which marketing automation as a supporting element of sales will be addressed.

2.1 Digital marketing - the road to marketing automation

Marketing is continuously changing, as mentioned in the introduction. Although it changes, the key essentials are still the same. According to Catriona Hauer (2012) marketing is still meant to create awareness among the desired group of people, only the means of it have changed drastically during the last few years. Karjaluoto (2010) also states that marketing has changed from a functional process thinking towards comprehensive marketing wholeness, which indicates towards integrated marketing communications (IMC). Integrated marketing communication implies to the planning process of creating the marketing message as coherent and clear as possible towards the customer. After successful IMC process, the customer should be able to have a clear vision of the brand, no matter what the marketing channel. (Karjaluoto,

2010) The high number of different means of marketing has enhanced the creation of more holistic integrity to the customer and at the same time increased the overall workload of marketing, thus marketing automation is there also to help to make this process more efficient and ultimately serve the customer better. Automated marketing as such, as its name suggest, is marketing that has been automated, and this has been made possible with the help of marketing that is digitalized. Thus, digital marketing and digitalization play a crucial role when studied automated marketing and the effects of automation supporting sales. (Buckling et al. 1998)

The most known means of digital marketing are direct marketing (email, mobile) and internet marketing, which means marketing in a particular web site, in banners, search engine advertising and search engine optimization. Other ways of digital marketing are viral marketing, advergaming, mobile marketing, social media marketing, interactive television and webinars. (Karjaluoto, 2010)

According to Leppäniemi and Karjaluoto (2005) mobile marketing as one of the fastest growing digital marketing mean is described as “the use of mobile medium as a means of marketing communication”. Today when the ever-growing smartphone market reveals new ways of digital marketing, mobile marketing has widened from short message services to in-game mobile marketing, mobile web marketing and location-based marketing. In addition to these, cross-platform mobile messaging applications and other social media applications have created an optimal environment for digital marketers to market, advertise and collect data. (Tunsakul, 2011)

2.1.1 Relationship marketing and data collection

When marketing in a traditional way aims towards a direct increase in sales and do not take into account the possibility of a life-long relationship with the customer, rises the need for relationship building and nurturing among possible customers and customers. This type of marketing is called relationship marketing. (Gummesson, 2002)

Relationship marketing has always been around us, but now in the digital age, the relationship marketing creates a need for a new definition. Specialists Sheth J.N., Parvatiyar A. and Sinha M. (2015) created a new definition to describe relationship marketing. It goes as follows: “Relationship marketing is the ongoing process of engaging in collaborative activities in programs with immediate and end-user customers to create or enhance mutual economic, social and psychological value, profitably.” (Seth, 2015, p.123) According the researchers the underlying themes in the definition are the purpose, parties, and programs. They also state that the relationship marketing will extend to many areas of marketing due to the phenomenon of increased cooperation and collaboration with the customers. As well as Sheth et al. (2015) and Gummesson (2002) emphasizes in their articles that development of information technologies, customer relationship management systems, and

digitalization as a whole changes marketing in a way that it is aiming towards individualization with the help of digitalization.

Digital marketing gives the marketers a possibility to collect data based on the actions that the future customers and interested people have done via different marketing channels. Various means of digital marketing can be traced and followed based on analytics and saved in the customer relationship management system. (Karjaluo, 2010) When the data can be traced and restored transparently, it gives the marketers a new way of building up a relationship with immediate and end-user customers as well as a proactive deed e.g. in B2C marketing.

Gathering information happens via e.g. e-commerce software, email, which can be seen as the element between customer actions and the CRM system. Combining customer relations management system and utilization of e-commerce from the technological side composes a data gathering and restoring entity. (Järvinen and Taiminen, 2015) This process of gathering information, further processing and utilizing will be issued next.

2.2 Customer relationship management system

Customer relationship management has been among businesses for a long time. At first it served as the core of the customer service, where the data was collected and then utilized to serve customers, not as such as a tool for marketing. Now, due to rise of information technology, customer relationship management systems are used to store a vast amount of information from different channels to be used in sales, marketing, customer service and in other parts of the business. (Fjermestad, 2006) The traditional CRM system has turned from CRM to electronic CRM (eCRM) where business transactions are happening online, where data collection, and actions inside the company all are stored inside the customer relationship management system real time. (Gurau, 2003) In the end the whole development process of CRM systems has moved from supporting transactions to supporting whole processes. (Pombriant, 2015)

Customer relationship management systems are developed to make the process of gathering data, identifying the most valuable customers and retaining the customers easier. CRM system gives the operator a possibility to serve the customers with customized products and services based on the data gathered. When all actions happening online and with the help of software, CRM system is cost efficient when developed right and working. (Rigby, Reichheld and Scheffer, 2002) The data collected to the CRM systems enables the companies to automate proactive and normal processes such as configure price quote (CPQ) or journey mapping where customer data and actions made by customers can be traced and used efficiently. The movement of CRM towards supporting whole processes leverages the utilization of CRM today. (Pombriant, 2015)

Customer relationship management systems lay the groundings for automated marketing to work. Data collected from the marketing mix actions

enables automation to be utilized in relationship marketing, which is commonly used in B2B markets. (Heimbach et al., 2015) Above addressed digital marketing and customer relationship system establishes the groundings for closer investigation of lead generation, which will be discussed next.

2.2.1 Lead generation

Before information technology and different e-commerce solutions, lead generation usually happened via networking or direct marketing, which is aiming straight towards a deal. Harvard business school professor Üstüner and Godes (2006) suggest in their paper an optimal networking model for a sales person to gain sales. At first, it starts from the prospect identification, goes to lead generation, which after towards solution creation and further closing the deal. The paper includes different networking types depending the situation where the sales person is aiming towards a sale. Without a doubt, this sort of lead generation works especially in B2B business, but today's technology has made the process possible to happen online and automatically, when the sales force gets the already processed lead in the CRM system. (Järvinen and Taiminen, 2015)

The process of evaluating new possible customers starts with dividing persons or companies into different segments based on their level of possibility to be converted as a sale. D'Haen and Van den Doel (2013) have created a sales funnel for the customer acquisition process. The funnel can be seen in the figure 1.

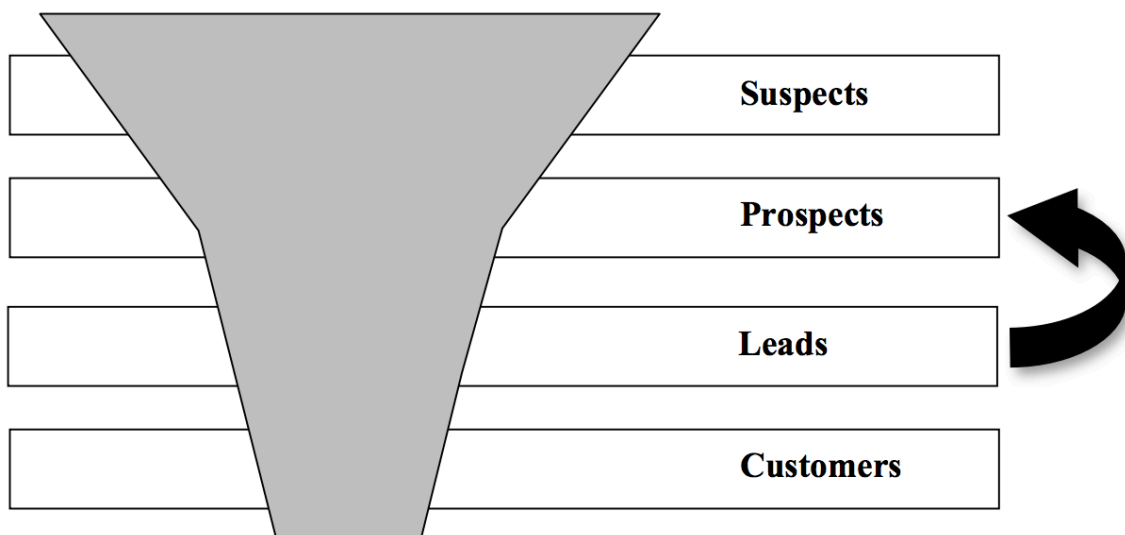


Figure 1 Sales funnel (D'Haen and Van den Doel, 2013)

The funnel starts from *suspects*, which include all possible customers there are. Then follows *prospects* that consist of a list of persons or companies, which are selected using a set of arbitrary rules, thus prospects are suspects who meet predefined criteria. After prospect comes *a lead*. Leads are persons or companies fulfilling more accurate criteria or have shown some interest during the selection process. *Customers* consist of the leads that are eventually converted to sales using, for example, a physical contact as the mean. (D'Haen and Van den Doel, 2013)

The process of evaluating suspects, prospects and leads usually contains a vast amount of data mining based on certain requirements. The process can be divided in to two; mining based on the actions already saved and available (accurate), and second mining the data acquired somewhere else (inaccurate). (Srivastava et al., 2000; D'Haen and Van den Doel, 2013) Suspects, prospects and leads acquired with the usage of marketing mix can be qualified and further processed with the automated nurturing process in marketing automation (Järvinen and Taiminen, 2015), which will be addressed in the chapter 2.3. Content marketing is one of the most valuable marketing tools when generating suspect base where prospects and leads can be further filtered, hence it will be discussed next. (Holliman and Rowley, 2014)

Content marketing

Discussion about the position of content marketing has been among us ever since the term content marketing became popular. (Chernov, 2014) Inbound marketing has been used as a wider term referring to content related actions such as blogs, podcasts, eNewsletters, web site pages, whitepapers, search engine optimization, social media marketing and other means delivering content. (Lin, Yazdanifard, 2014) Making a difference between inbound marketing and content marketing is hard and in the end content needs the means used in inbound marketing to spread and inbound marketing needs content to work. (Chernov, 2014) Why inbound marketing and content is mentioned in this research is because inbound marketing is content marketing and for automated marketing to work content in some for is needed. Inbound marketing aims towards pulling the customers closer to the company by using one or several means of inbound marketing and eventually creating suspects and further prospects, leads and customers. (Holliman and Rowley, 2014)

Inbound marketing and content marketing are used both, in B2B marketing as well as in B2C marketing. In B2C marketing influencing statements can gain trust and it has been seen that with valid content and with good means of inbound marketing results are achieved. (Dognim and Benbasat, 2006) Inbound marketing is commonly referred to B2B business where customer relationship is important and maintaining the relationship is crucial. This can be achieved with content marketing. (Holliman, Rowley, 2014) With the help of e-commerce and mobile commerce (m-commerce) commerce is available at any time to possible customers. It also enables information gathering at any given time. (Balasubramanian et al., 2002) Data gathering (inbound marketing and e/m-commerce) and restoring means (CRM),

including the validation of possible suspects, prospects and leads drive the research towards marketing automation, which will be addressed next.

2.3 Marketing automation

Randolph Bucklin, Donald Lehmann, and John Little first introduced the idea of marketing automation in 1998. Their paper *From decision support to decision automation: A 2020 vision* gave the academic world a glance of how marketing automation will change the marketing field. Before the supporting systems of marketing were mainly helping the marketing managers to make better decisions. (Neslin, 1994) Bucklin et al. (1998) suggested that supporting systems that before were helping the managers are transforming to mainly automated systems, thus the work of marketing managers is going towards rule perfecting for automation and the focus will be targeted for greater decision making. Later on Little (2001) introduced the term marketing automation in his presentation in 5th Invitational Choice Symposium and from that on the marketing automation has been referred among marketers.

The explanation of marketing automation does not differ as such when comparing different researches and articles. All of them suggest that term marketing automation means automatic personalization and customization of marketing mix to meet the customers' needs. (Heimbach, 2015; Montgomery, 2008; Rimmer, 2013; Järvinen&Taiminen, 2015) The roots of marketing automation come from business-to-business where sustaining the customer relationship is crucial for continuity of the business, thus lead and customer nurturing is important. (Jagdish, 2015) Sustaining the customer relationships requires also gathering customer data, which obligates for combining automation and CRM system that has discussed in the previous chapters.

Although the beginning of marketing automation is in B2B sector, the usage of automation in more complex B2C sector is relevant and effective. (Lamont, 2015) The difference lies in the methods of B2B and B2C automation. Where B2B automation is improving customer acquisitions by managing interactions with the prospect, B2C automation is centralizing customer data and improving campaign engagement. (Cook, 2015) In B2C marketing automation the brand communication towards the customer is enhanced, and it relies on relevance of the information provided e.g. configure price quote - CPQ. (Dijkstra, 2008) The biggest automation software producers from B2C sector have already separated these two and differentiated the automated B2B marketing from B2C leaving B2C marketing automation off the name and created entirely new designations for it. (Jones, 2015)

Marketing automation, in general, complements interactive and direct marketing with the help of automation and further on in CRM and email marketing. Thus, a clear descriptive figure can be shown of the marketing automation process. Heimbach et al. (2015) have presented the whole process in figure 2 below.

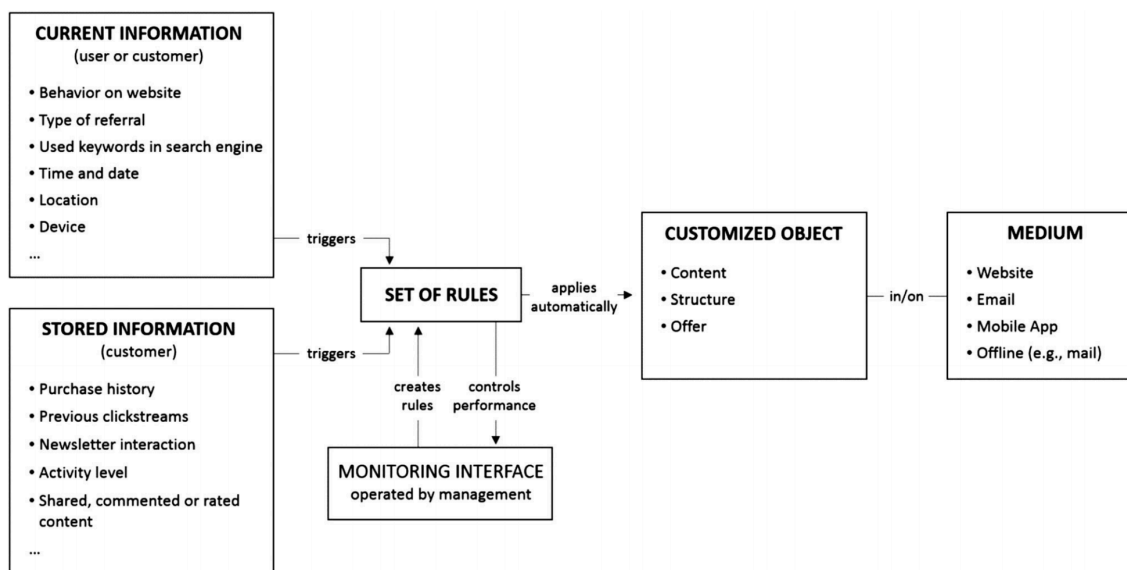


Figure 2 General framework of marketing automation (Heimbach et al., 2015)

The automation process starts with the information, which is either current (on-time-actions, see chapter 2.1) or stored (information in the CRM system, see chapter 2.2.) Further on information is being used to create customized content, structure or offer to the customer (see chapter 2.2.2). Based on the preferred medium the information is passed on automatically to the customer. In figure 2 presented by Heimbach et al. (2015) as well as vision paper of Bucklin (1998) and Little (2001) the physical operations made by marketing managers are associated with the monitoring interface.

As seen in figure 1 the information flow culminates to the rules, which are set by the marketing managers. These rules are related to personalization and customization process, which enables the marketers to set rules that the right kind of content reaches out the particular type of customers.

Studies made of automated marketing have not yet shown clear sales supporting framework, but a good example of marketing automation process in B2B business sales has introduced. Järvinen and Taiminen (2015) in their single case research *Harnessing marketing automation for B2B content marketing* addressing the benefits of marketing automation when improving the quality of sales leads and how that is affecting on closing.

Next, the personalization and customization process will be taken into a closer investigation after which the rule and scoring process is being discussed. Further, the relationship between the automated marketing process and sales is addressed.

2.3.1 Personalization and customization

Personalization and customization are core elements in marketing automation. Based on the personalized information available customers can be served better by customization. (Järivnen and Taiminen, 2015) Differencing personalization and customization is crucial. By personalization, it is often referred to decisions making of marketing managers based on the information gathered from the potential customers. Where customization happens after and is usually executed to create interactive marketing that is done after the personalization process. (Montgommery and Smith, 2008)

The term personalization in marketing is described by many researchers as an adoption of the marketing mix based on the information gathered about the customer. (Roberts, 2003, p.462; Cöner, 2003; Wind and Rangaswamy, 2001) The process of personalization is presented in figure 3 below. In this figure, Vesanen (2007) presents the framework where the relationship is created in interactions and data exchange between the customer and the other party.

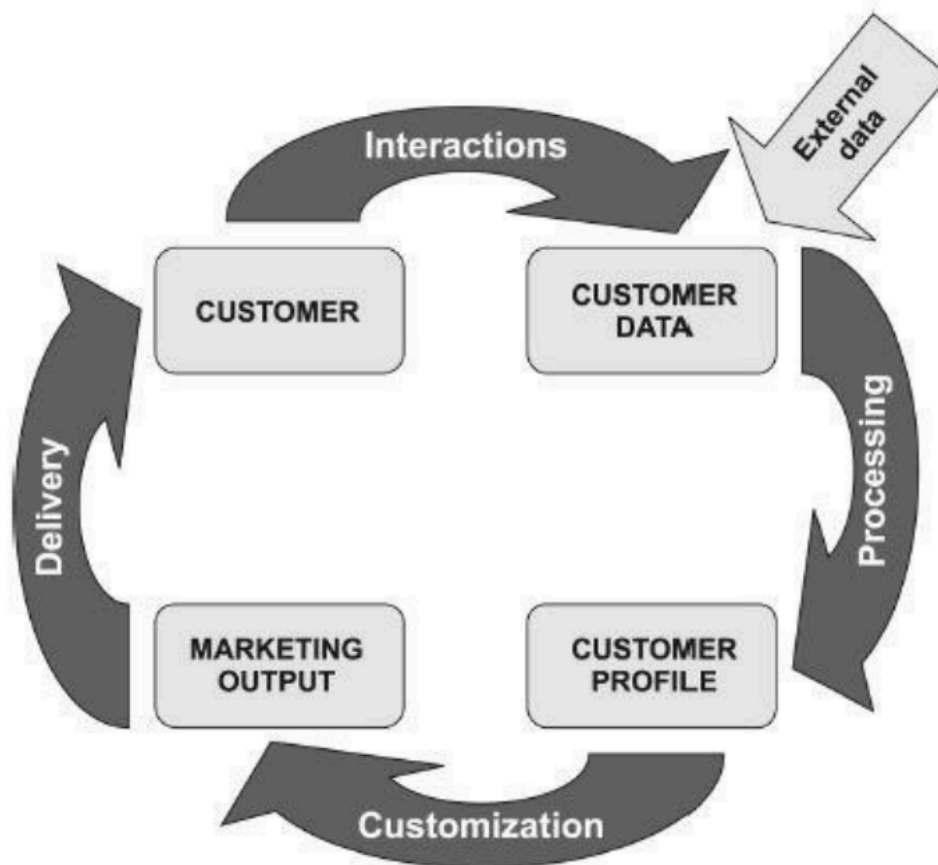


Figure 3 The process of personalization (Vesanen, 2007)

In this conceptual framework, figure 3, data is imported from external sources as well as from internal sources by learning about the customer during the process. External data sources can be e.g. information gathered from analytics. (Vesänen, 2007) Personalization, as said, gives the marketing manager information about the customers and the habits of them, after which the customization can be done. Customization process refers to the content, data mapping, offers and e.g. configure price quoting. With customizing the content more adaptive towards the customers can be achieved better result in creating the relationship and interaction between the customers. (Heimbach, 2015) After personalization the monitoring interface (see figure 1) can be done, and it will be addressed next.

2.3.2 Rules and scoring

The traditional way of creating sales opportunities have always included external list purchase, cold calling, trade shows or other manually executed work. (Bernier, 2014) Data gathering and analytical systems have made the process more scientific and the lead acquiring process can be done automatically. The most potential suspects, prospects and leads can be filtered automatically from the big data mass to be further treated by a more specific marketing or dedicated sales representatives. (Bernier, 2014) The personalization process, discussed in the previous chapter, creates the groundings for the lead scoring and creation process of the rules, which enables the automated filtering process.

The automated marketing process corresponds the normal marketing management process but includes the automation part. At first, the data analysis is done, and the status quo is determined. The possible objects that can be fulfilled are derived, and the set of automated actions are done. Then the data acquired is analyzed and further decisions concerning marketing campaigns are made. (Hiembach, 2015) During the process, the *rule setting* (which is a lead and which is not) and *lead scoring* (on what stage of the purchasing process the lead is) are determined. In this process, marketing managers deter these rules drawing insights e.g. A is interested in B based on this campaign and use this data in upcoming automated actions. (Little, 2001) Thus, the historical and live data gathered from the customers' actions are the most critical part of the marketing automation rule determination process. This data can be stored in various systems e.g. CRM, which will match the already existing data to new, based on the original information, and that way can create new leads or fulfill the already existing ones. (Järvinen&Taiminen, 2015) After the rules are determined, information gathered, and possible sales leads committed marketing managers can start scoring and nurturing the leads by offering certain kind of content or marketing campaigns and proceed in the qualification process, which is further automated. After this, the most potential leads are transferred to elaborate further by sales representatives. (Järvinen and Taiminen, 2015) Rule setting and scoring process gives the groundings for the sales process, which is addressed next.

2.4 Automated marketing and sales

In automated marketing the result is always a good quality lead for B2B sales representative or an actual deal in B2C sector, if not that, at least, data about the customer is gathered. (Reinhold and Reinhold, 2014) In B2C sector, there are multiple software engines available for marketing managers to collect information about the customers, create automated campaigns or do targeted marketing. In IEEE Intelligent system publication (2011) is presented interactive sales process where aggregate, anonymous knowledge of customer preferences is combined with specific data about the ongoing negotiation process with the current client. Another data-driven intelligence software is presented by Reinhold and Reinhold (2014), where a recommendation system works as a B2C marketing automation system. In figure 4 an example of a recommendation system is given.

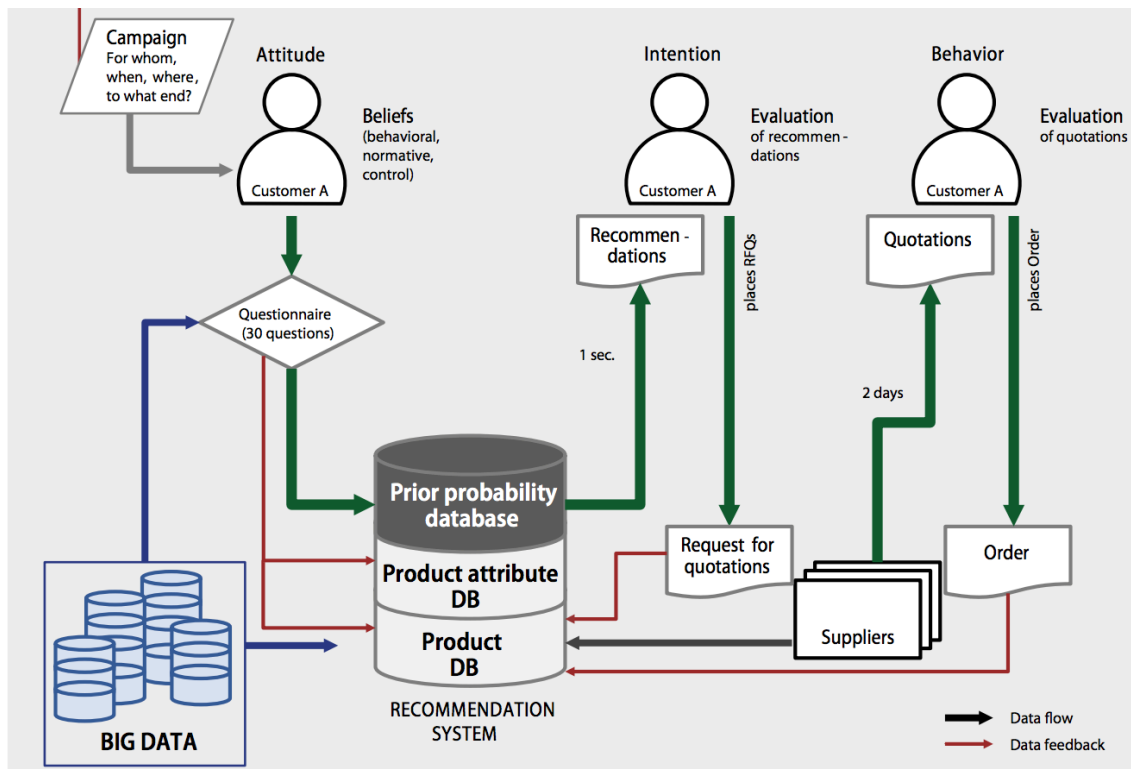


Figure 4 Recommendation system (Reinhold&Reinhold, 2014)

Recommendation system in figure 4 shows the data flow and the possibilities that the big data and recommendations create for marketing managers in campaigning and cross-selling.

In B2B automation, the amount of compelling content is in a crucial part. Based on the rules determined the automation software filters the possible

customers during the process and basing on those actions provides the customer with specific content. This leads to a situation where the most potential customers are willing to purchase, and the sales representative can proceed in the process. (Heimbach, 2015) In figure 5 Järvinen and Taiminen (2015) shows an example of B2B sales process where marketing automation is utilized. Figure 5 shows the initial source of the suspect, how it transforms to prospect and eventually become as a lead and further a deal in the sales negotiation part. During the automation process, where the customer is provided with compelling content automatically, the lead becomes ready to make the purchase, and this way supports sales in the initial process where the customer is familiarized with the company and the product.

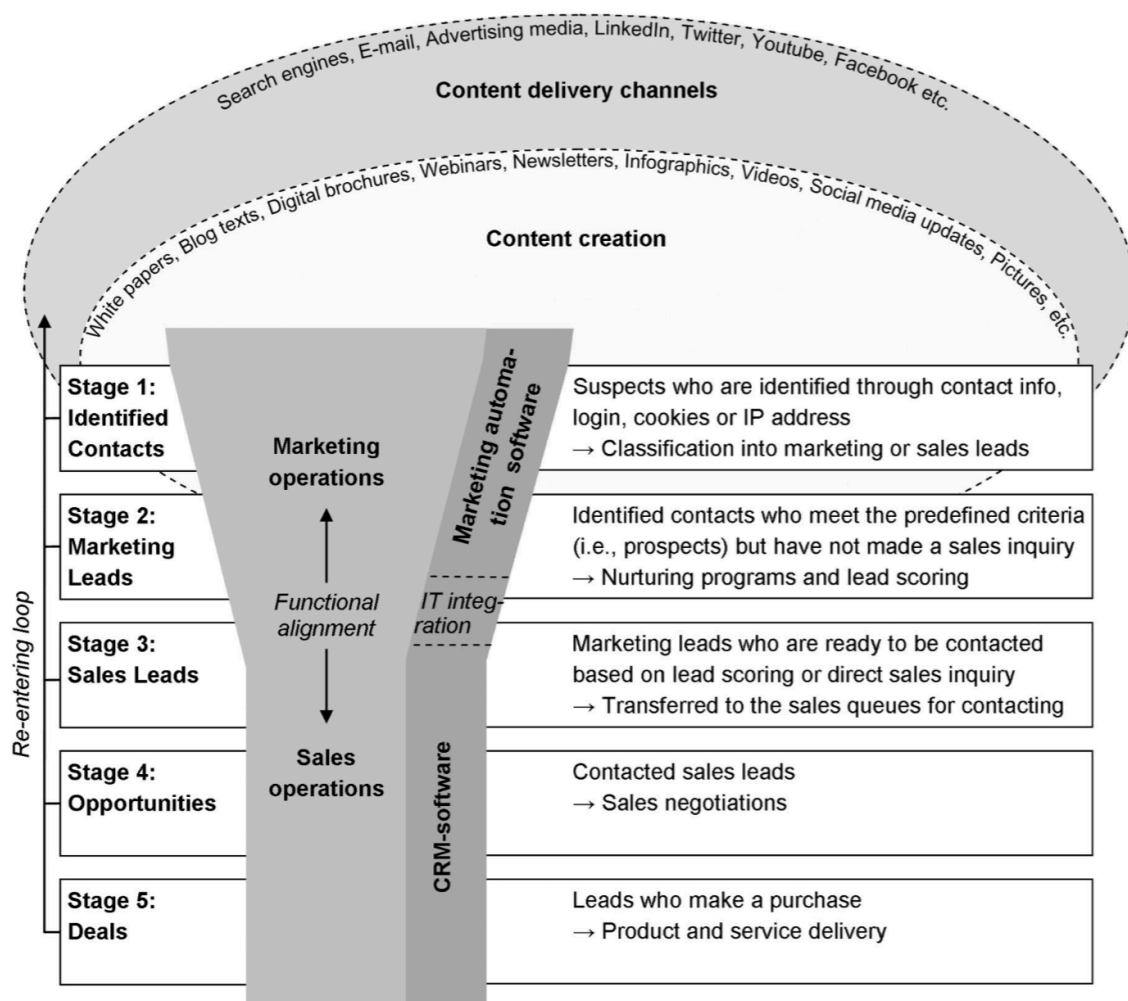


Figure 5 B2B sales funnel example (Järvinen&Taiminen, 2015)

As seen in figure 5 the process consists of five stages. In the first stage, the contact is identified after which the marketing automation software starts to work and delivers the most suitable content to the lead. During the nurturing process, the ready sales leads move from phase two to phase three and four,

where sales take the leads into their process, with the help of CRM software. The leads that are not closed are transferred back to the nurturing process where marketing starts providing content based on the observations that are made by sales and marketing together. The data saved by sales and marketing in the CRM software enables the automation software to work even higher level, than just using the data gathered by analytics. (Järvinen and Taiminen, 2015)

2.5 Conclusion of the literature review

Marketing automation consists of many components and needs a lot of work from the analytical as well as marketing side, not to mention software needed the automation to work effectively. When it comes to differentiating the two side of marketing automation, B2B side of it requires a lot of content distributed on time and the other hand B2C side requires a large crowd and cleverly executed campaigns after which the automation system is effective. Based on existing academic knowledge the parts that automation requires to work are presented in the literature review. Lack of thorough academic research in marketing automation and how it affects in sales creates a need for a generic framework where B2B and B2C marketing automation processes are combined. In figure 6 the author in a simplified form figuratively presents the process. Figure 6 create an understanding of the automation supporting sales in B2B and B2C sectors.

In figure 6 the customer phases in the outermost arrows are based on the sales funnel by D'Haen and Van den Doel (2013). The customer phases are evolving towards sales and at the same time expressing the phases in marketing automation processes. In B2C automation, the lead phase is taken away due to the different sales process when compared to B2B process. Rarely in B2C sales lead nurturing is as personalized as in B2B sales. Short-term marketing is referring to B2C marketing and relationship marketing is related to B2B marketing by Sheth et al. (2015) In the research of Sheth et al. (2015) the relationship marketing process is described longer, and it requires more nurturing, whereas the aim of the short-term marketing process is to push the customer towards a prompt transaction.

In the beginning of the process marketing mix is adapted to acquire suspects and prospects, which are nurtured in both B2B and B2C with the help of marketing automation. Further, adopted marketing automation is used to guide the prospects and leads towards the sale in different phases during the process. The sales process in B2B is acquired from the sales funnel example of Järvinen&Taiminen (2015), and B2C model is taken from the research about computer tailored persuasion by Dijkstra (2014).

An important part of marketing automation is the data flow from separate phases of the sales process where the data is collected to the CRM system for further use. Arrows show the information and unclosed lead flow from the sales process back to the initial marketing process where more accurate marketing can be done, and marketing can further nurture returned leads. The

simplified model gives an image of the marketing automation functions and how and where it supports sales during the customer journey.

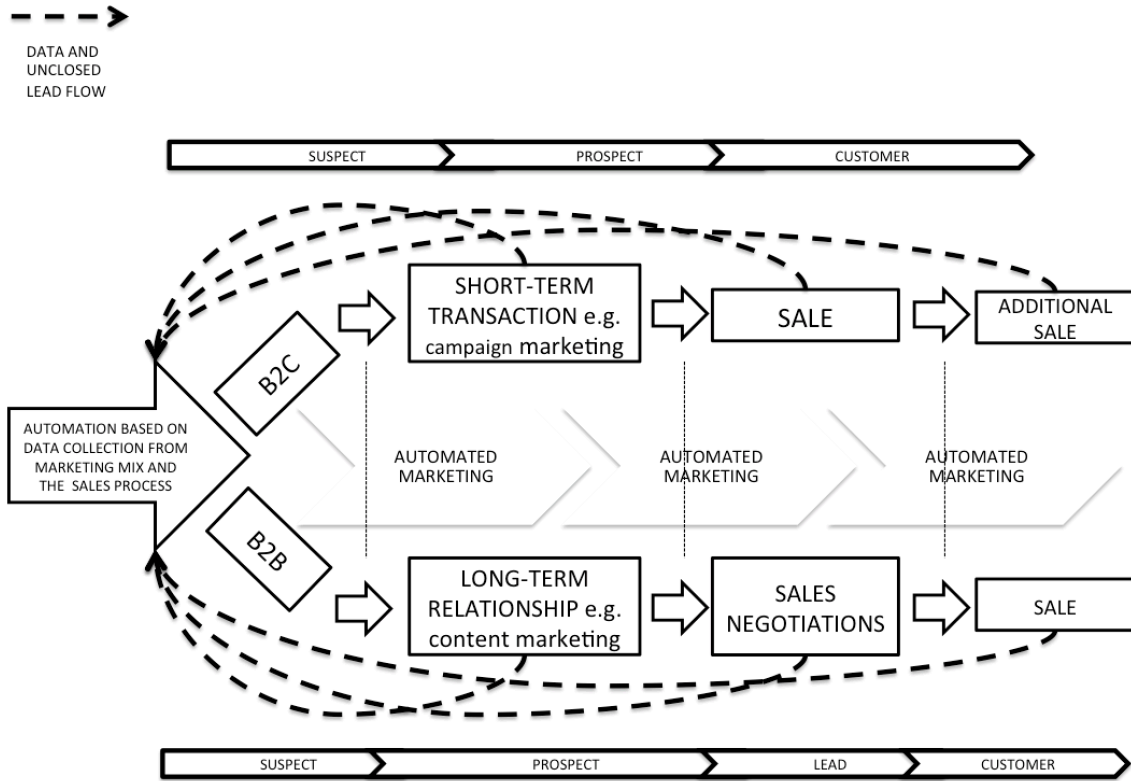


Figure 6 Automated marketing process in B2B and B2C

3 RESEARCH APPROACH AND METHOD

Chapter three outlines and explains the research methods that are used in the research. At first, the qualitative method used in the research is presented and case study as well as the systematic combining approach is explained. Further the data collection methods and case companies are presented.

3.1 Qualitative research

Qualitative research is an umbrella term for many different research methods and approaches. Qualitative research can include e.g. text, interview transcripts, videos, internet sites, etc. The data used in qualitative researches is often primary data. (Saldaña, 2011; Flick, 2009) The essential features of qualitative research are the correct choice of the appropriate methods and theories, analysis of different perspectives, the reflections of the researcher it self and the variety of different research approaches and methods. (Saldaña, 2011) The goals of qualitative research can vary depending on the nature and purpose of the particular project at hand. The findings are often composed of the representations and presentation of central findings from the analytical synthesis of data. (Saldaña, 2011) The goal in qualitative research is not to test something that is already done; rather it is to develop and discover something new. (Flick, 2009) In qualitative research, the findings are not numbers as in quantitative research, but words. (Flick, 2009)

In the field of marketing qualitative research is highly used due to the fact that the research should provide information, which allows understanding the phenomena surrounding marketing. (Carson et al., 2001) The marketing phenomena's cannot be adequately studied in an isolated artificial settings, thus this research should be conducted using qualitative research method. The aim of the research should not only be to create new scientific knowledge, but also to create practical knowledge for ordinary problems around the subject studied. (Flick, 2009) Thus, the qualitative research method is suitable for studying

automated marketing and how does it support sales. In this research case study method was used and interviews conducted, hence those will be addressed next.

3.2 Case study

Case study method provides rather an approach than a method to the subject studied according to Eriksson & Kovalainen (2008). Case study aims towards a production of detailed and holistic knowledge, and usually exploits various empirical sources and further analyzes those. (Eriksson & Kovalainen, 2008) There are two types of case studies, *intensive* case study and *extensive* case study. Intensive case study studies a unique case to create a holistic understanding and description of the case. Extensive case study aims testing of generalizable theoretical constructs by replicating a number of case studies. (Eriksson & Kovalainen, 2008) In this research extensive case study method is used to achieve the best possible understanding and in-depth information of utilizing automated marketing when it comes to supporting sales in the case companies and among the experts.

The topic researcher uses in a case study can be e.g. a company, person, a community or equivalent. The important thing doing a case study is to have a clear start and ending point to the case and clearly formed research questions, otherwise a clear and coherent research cannot be executed. (Saldaña, 2011)

By combining the empirical data acquired from the case studies and academic literature during the research, which already exists, can be achieved even more thorough understanding of the phenomena around the topic. (Dubois & Gadde, 2002) According to Dubois & Gadde (2002) combining empirical data to theory during the research process is called a systematic combining approach. In this research systematic combining is used due to the nature of the research. Existing academic literature is not covering the topic of automated marketing or automated marketing supporting sales thoroughly. Thus, combining the already existing theory with the empirical data gathered, the best result was achieved.

The research includes three different interviews of companies utilizing marketing automation supporting their sales. In addition three experts from the sector were interviewed to achieve even better and in-depth knowledge of the subject. The companies preferred to be anonymous as well as the experts accompanying the research. The previous knowledge of the author assisted the research e.g. the case companies and the best experts of the particular field were easily reachable. The expert interviews were done during the process of gathering academic literature around the topic to be able to combine theory and empirical data already during the process. The case companies and experts are presented in the chapter 3.5 as thoroughly as the professional confidentiality allows.

3.3 Data collection methods

There are six possible ways to acquire evidence for case studies according to Yin (2003). The sources are documents, archival records, interviews, direct observation, participant-observation and physical artifacts. (Yin, 2003) For this research the interviews and more accurately interview transcripts were examined and analyzed. The previous knowledge and experience of the author provided a good basis for the research as well as mitigated the preliminary work done before the actual research started. The research questions were conducted based on that preliminary information. According to Eriksson & Kovalainen (2008) using a case study method is flexible and useful when researching a new phenomenon; hence it allows the researcher to go back and forth in the research process when new questions rise during the research. Thus case study method was used in this research.

Each of the case companies were interviewed separately and the interviews were conducted in a semi-structured way. Semi-structured interview does not follow fixed order of questions around the topic, rather it includes a general plan for the research topic and adapts during the conversation. (Packer, 2011, p.43) This type of interview was selected to get the best possible understanding and in-depth knowledge around the topic. All interviews were recorded, transcribed and analyzed. The interview questions started of the general knowledge of automated marketing and followed questions how the particular company or expert used automated marketing. Further questions about the sales aspect were presented. The interviewee was given a possibility to explain all processes thoroughly as long as the focus remained around the initial topic. The general plan and the main questions of the interview can be seen from the appendix 1.

3.4 Data analysis

Qualitative research where a case study approach is used is aiming towards producing understanding a social phenomenon with flexible research methods. (Yin, 2003) Thus, the analyzing of the data should be done using a case study analyzing method. The method used in this research is made by Eriksson & Kovalainen (2008). In the method of Eriksson & Kovalainen (2008) every case is first studied individually and then cross-compared to find out the similarities and differences between the cases. To achieve even better understanding of the cases in addition of Eriksson & Kovalainen method of analyzing, an analyzing instruction of Boeije (2011) was used. In the method of Boeije (2011) the data is first separated into segments and then again assembled as a whole, where the important findings are highlighted. The whole of data is then further divided in to categories or themes. After dividing the themes, the similar ones are put together and further coded to get the most important and relevant information out of the case interviews. Further the codes are combined and patterns and

relationships between the interviews are compared. (Boeije, 2011, p. 76-79) In the last stage the first created categories are modified to correspond the findings made during the analyzing process and are then presented as chapters. As a result four chapters and two subchapters were formed. In those chapters findings are presented in a way that first the overall subject of the chapter is presented after which company and expert views are addressed. Those are presented in a combination of direct quotations and summaries. Companies are presented as company 1, company 2, company 3 and experts in the same way. Chapters are presented further in the chapter 4.

3.5 Case companies and expert interviews

The case companies chosen to this research were all doing marketing automation at some level and also used it as a supportive element in their businesses, not only as a part of their customer service processes. According to Eriksson & Kovalainen (2008) there is no minimum number for the case companies selected due to the variation in subjects studied. Thus, a sufficient number of cases should be assigned to get the best possible understanding of the phenomena. In this research three case companies and three expert interviews were done to acquire enough information of the marketing automation processes and how those cooperate with sales.

Companies studied in this research were small or medium size to get up-to-date information of marketing automation processes in sales. Small and medium size companies are often more flexible in their processes and are more willing to explore new ways to achieve better results, thus smaller companies were included in this study. The aspect of larger companies was obtained from the experts. According the preliminary knowledge of the author large companies usually exploit outsourcing in software and marketing automation matters, hence the interviews were executed for experts who are offering outsourcing services in this field.

In the selection process of case companies no certain field was selected. The case companies were chosen from various fields of business to get an extensive overview of the subject. Due to the previous knowledge of the author the companies, which are practicing marketing automation as a part of their sales processes, were already familiar and easily reachable. In the table 1 the field of business, the status of the interviewee and the length of the interview are presented.

Experts were familiar with both B2B and B2C sectors and two of the case companies were working in B2B as well as in B2C sector. One of the case companies was only working in B2B. This combination of small and medium size B2B and B2C companies gave the opportunity to make the research more comprehensive. Due to the fact that both B2B and B2C companies use marketing automation as a part of their sales processes, the subject was studied generally and both B2B and B2C were taken into account. Based on the

knowledge gained during the interviews, emphasis was in the B2B type of automation supporting sales.

Table 1 Interviewed experts and the case companies

Industry	Interviewee status	Interview duration
Expert 1 B2B/B2C	Head of content and inbound marketing	56 min
Expert 2 B2B/B2C	CEO	57 min
Expert 3 B2B/B2C	Executive level professional in marketing communication business	100 min
Information services B2B/B2C	CMO	52 min
Financial services B2B	CMO	45 min
Educational services B2B/B2C	Head of analytics	44 min

4 FINDINGS

In chapter four, the findings of the research are presented. Interviews were executed for both specialized persons working as experts in the sector and companies, which are utilizing marketing automation as a daily part of their business. Interviews were first analyzed and then coded to reveal similarities and differences between the interviews. As a result of the analyze four chapters were found and those chapters are presented here. Experts working in the sector had a vast experience of various companies utilizing marketing automation, and case companies gave a more precise look at the operations. Questions asked were the same in both cases. Thus, all interviews were analyzed at the same time. To maintain the privacy of the companies, those are presented as company 1, company 2 and company 3. And in the case of consultants, those are presented as expert 1, expert 2 and expert 3. Chapter's start from the wider questions related to marketing automation then moves towards the structure and parts that are needed. After which the combination of marketing automation and sales as well as the future of marketing automation and sales are presented.

In the first chapter, all interviewees were asked how they would describe a developed sales and marketing process. This question opened the discussion of the marketing and sales processes, which gave the interview a good start as it can be seen from the chapter 4.1.

4.1 A developed sales and marketing process

All interviewees emphasized the connection and communication between marketing and sales. Companies, as well as the experts, mentioned that the company culture and processes should aim towards a wholesome synergy between the departments in order to help marketing make better decisions with the aid of feedback that they get from sales. According to company 1, this leads to a situation where sales department can make more deals and again give valuable feedback for marketing e.g. about the lead quality.

First of all, it is crucial to understand that sales and marketing are working together. Marketing supports sales and sales supports marketing. They are the same entity. (Company 1)

In addition, all interviewees mentioned that technological solutions are critical because those give the opportunity for data collection and information flow, which enables more accurate and efficient work for both sales and marketing.

Back in the days, when sales and marketing were not communicating together they were basically working for the same goal, but entirely separately and with their own methods. Now, when we have CRM, data collection is possible, we can nurture leads for sales with automation and on top of that the communication between the departments is increasing, we are able to get better results. (Company 2)

Although all interviewees, were emphasizing the importance of communication and technology, they also said, especially experts, that it is still relatively unusual that sales and marketing are working together in the magnitude that it would be truly useful. Experts 1 and 2 say that it takes time and transformation in thinking to get the process working, as it should. Expert 3 three brings up a good example when communication is not working.

If a company is making a software purchasing decision for marketing and sales, and marketing is doing it solely, the most important part, sales, is forgotten. Too often it happens that the opinion of sales is taken into account too late, which is not cooperation. (Expert 3)

As a summary, all interviewees were emphasizing communication, technological solutions, and sophisticated data collection methods, which together are consisting a developed marketing and sales process in today's companies.

4.2 The concept of marketing automation

The interviewees were asked to explain the concept of marketing automation and the answers were rather ambiguous. All answers were about the same subject, but the details and focus on marketing automation differed among interviewees. The emphasis was in processes, content and sales. The experts explained the automation in a bit broader scale whereas the company representatives answered in a more detailed way.

The role of marketing automation is to automate the transportation of the lead from the very beginning of the purchasing process towards the actual transaction, and take care of it also after the sale is done. (Expert 1)

At the same time, expert 1 emphasized the need for good quality content and visualized it rather well.

...the marketing automation software is the engine and content is the fuel. (Expert 1)

The expert 2 and 3 were describing marketing automation as a process where economic of scale can be used to leverage business and broader masses can be served at the same time.

Running campaigns transforms from manual work towards automated processes, which are operated by the marketing automation software. There can be tens or hundreds of different campaigns, which are running from one year to three years and are automatically individualized based on the actions of customers. (Expert 2)

Companies emphasized the fact that marketing automation infrastructure is there to decrease the workload of marketing and when it is up and running it will serve sales better with quality leads. Companies also mentioned that content can be targeted better for the customers that need it and want it, with the help of marketing automation.

Marketing automation is there to nurture the whole lead mass and with the help of it; better leads can be highlighted from the crowd. At the same time, the work of sales becomes easier and also more efficient, when the leads are closer to the actual transaction point. (Company 1)

The company 2 defines the concept of marketing automation in a rather crystallized way.

Marketing automation is there to facilitate the whole process as well as serving prospects and customers with the right content in different channels. (Company 2)

To conclude the marketing automation concept, the idea of marketing automation was clear to all interviewees. It is there to serve the customers better and with less effort from marketing as well as enhancing the work of sales by serving them with better leads. The content creation was at the center of discussion with experts as well as the communication with sales. Companies put more weight to the processes and raised the communication with sales as one of the most important things. The explanations of the concept as a whole did not differ as such, rather the nuances and what part of marketing automation the experts and companies emphasized varied.

4.3 Objectives and importance of marketing automation in sales

Companies, as well as experts, mentioned that the objective of marketing automation is to create qualified leads for sales to close in B2B business and in B2C business categorize masses of people for further marketing or create direct sales. Further, with sophisticated data collection methods and automation software, there are possibilities to attract people with the right kind of content and campaigns.

The most important thing is that the sales representatives have a lot more information of the customer now, compared to the time before marketing automation. It is possible to bring user history, information from different channels where that particular customer is following the company. Is he or she following us on Twitter? Does he or she like us on Facebook? Which emails have the prospect or customer received? Which of those are opened? Which e-books are read and so on. (Expert 1)

Expert 1, 2 and 3 all emphasize that the most important thing for sales is the qualification of leads. Expert 2 raises a good factor, which is affecting a lot of the result of marketing automation.

If you think that marketing automation will automatically make sales, it does not, it is teamwork between sales and marketing, which makes it happen. If we think the content creation process, we need an understanding of the customer and about his or her everyday life. Sales people are pretty damn good in collecting feedback for the marketing team. (Expert 2)

Further, experts raise the growth on intensifying of the processes in marketing as well as the sales teams. With the help of marketing automation, leads can be divided into two categories for both sales and marketing, which will lower the amount of unnecessary work.

We describe it as a turning point between sales and marketing. We have marketing qualified leads and sales qualified leads. If the sales accept the lead, it becomes a sales qualified lead and if not, marketing will continue nurturing the lead. (Expert 3)

Companies are also emphasizing the same points that experts. In addition to those the company 1 mentions that marketing and sales process is more proactive. The process for particular customers starts earlier than before.

The biggest difference between the old and new marketing is the recognition of the customer. For that mass, which is recognized, the proactive marketing starts with the help of marketing automation. (Company 1)

Companies 2 and 3 are also stating the same thing. Companies are saying that the proactive marketing gives an opportunity for targeted marketing, and with the help of automation, it is efficient. They all mention the importance of the data collected during the marketing process and further in the sales process and also after the closing when the after sales and relationship building continues.

As a conclusion, based on the interviews, the objective of marketing automation is to decrease the workload of marketing and make marketing and sales processes more efficient. Among the interviewees, the marketing automation process is seen as a crucial point in improving sales results and customer commitment. Expert 1 sums up the importance of automated marketing for sales rather well.

The key benefits for sales are the possibility to do timely sales and the amount of customer data that can be collected, as well as how it can be used. (Expert 1)

Figure 7 is a simplified picture of the marketing automation process based on the interviewee's comments of marketing automation and how does it affect on sales.

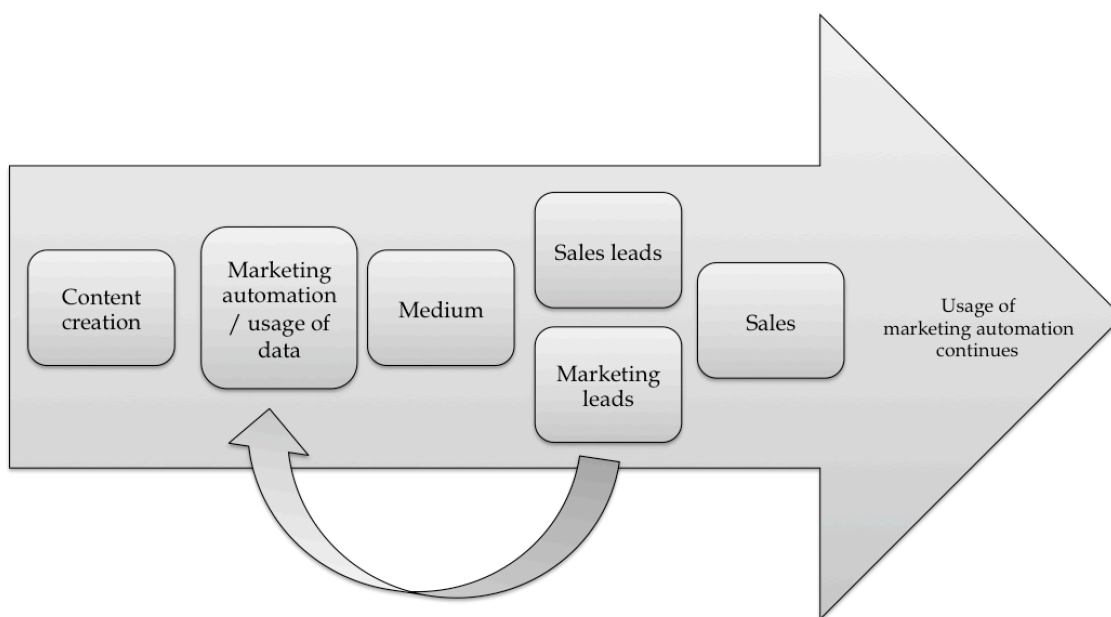


Figure 7 Simplified picture of marketing automation affecting on sales

4.3.1 Combining marketing automation and sales

Marketing automation process is there to facilitate sales, as it can be seen from the previous chapters. Hence, how marketing and sales can be combined to

achieve the best results? All companies and experts pointed out the communication and teamwork on a physical level between sales and marketing. Communication and process building between teams enables the functionality of marketing automation

Usually, when a company is doing good lead marketing, and it has good sales processes, there is something in common already between sales and marketing. But when automation is being used, it requires a lot more dialogue between those departments. If we really think what we want out of the lead, we need to discuss with sales that are the leads that marketing is producing working or not. Developing this process and communication between sales and marketing usually brings sales and marketing closer to each other. (Company 1)

There are certain things that have to be taken into account when creating leads, and those things should be discussed with sales. Unsuccessful leads are always checked over and further developed. Testing in cooperation with sales is playing a huge role here. (Company 2)

All companies and experts also addressed the need of content and further distributing that content at the right time, in the right channel to the right person. Again, companies and experts said that right content could be distributed based on the data collection and feedback from sales. Expert 1 states that successful content marketing can be done without marketing automation, and it is effective, but the question of context arise when those are automated based on the data.

How I can see it, personalized and automated messages to prospects are highly important because then we can get the benefit of timely messages and relevant content. Let's say, what I already touched on, I would highlight the importance of the contexts, at least as much as the content itself. (Expert 1)

Communication and processes between sales and marketing were highlighted but equally important was the software, hence it was addressed by all company representatives as well as experts. The role of the whole ecosystem, which is a combination of CRM software and automation system, was emphasized.

Marketing automation is a combination of different software parts. There are for example email automation program, CRM features and web-development features such as automated landing page creation. (Expert 1)

Usually, it starts with a CRM system, where another software is connected. Information is gathered to CRM where sales can further use it. (Expert 3)

Between companies, there was a lot of variation in their software decisions in marketing automation. Company 3, which was in the early stage in their

marketing automation process was using single software for executing marketing automation and used different CRM where the data was transferred. The system was not as developed compared to company 2, where the CRM system, automation, and their core business information were combined via e-commerce system. Company 3, on the other hand, was using one combined CRM and automation system, which was used as the base for the whole business, in all departments. All ecosystems were working with the same principle regarding data collection and automation, but variation appeared in how parts of software were combined and on what scale.

To conclude how the combination of sales and automated marketing is possible based on the interviewee's comments, the first thing is that the communication between sales and marketing has to be in order to be able to work. Processes, how communication is done, where the information flows and who are responsible at every stage. Third the software ecosystem behind the marketing automation and is it build to serve both sales and marketing. Last but not least, content and the importance of context when distributed. The most important factors in successful marketing automation are shown in figure 8 below.

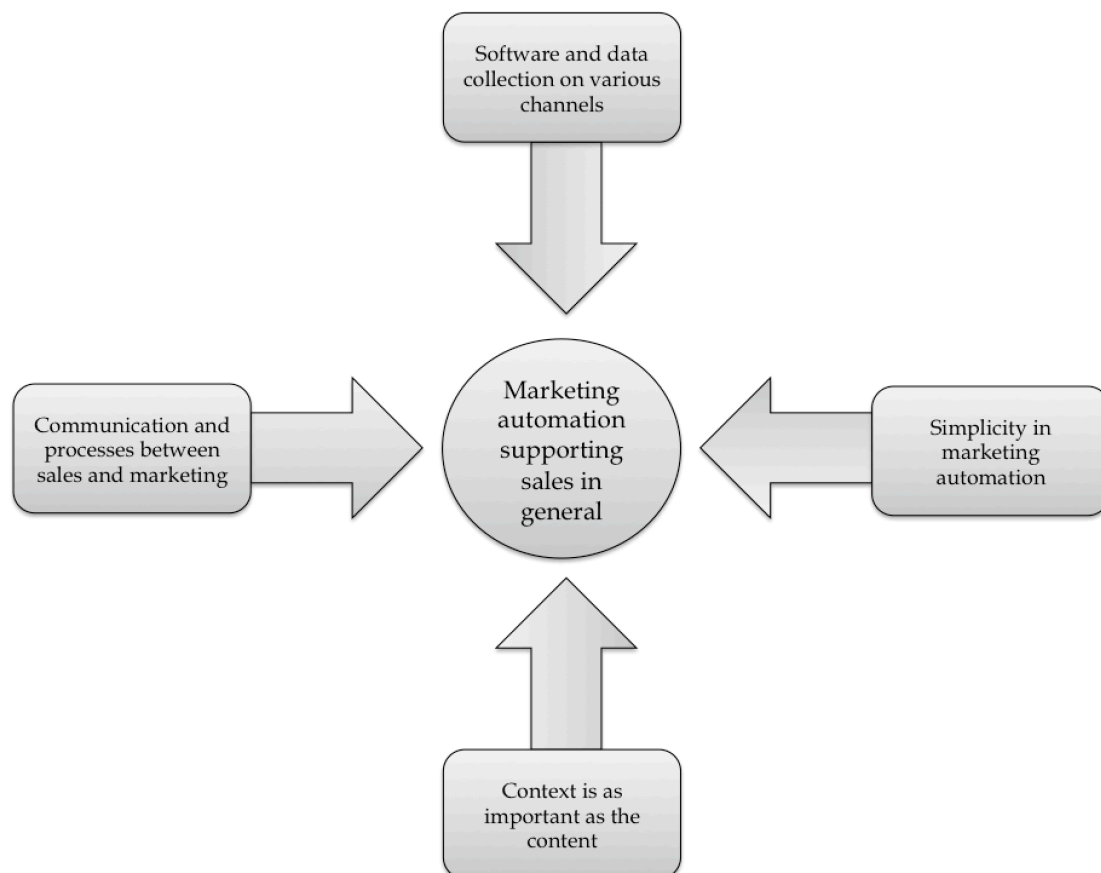


Figure 8 Core elements in successful marketing automation

4.3.2 Challenges

Combining marketing automation and sales is a rather vast project, and there are also a lot of challenges to overcome. As described in the previous chapter, the communication and processes between departments are crucial, and there are a lot of possibilities to go wrong. Experts 1, 2, and 3 addressed the issue with attitudes. Sales force might think that marketing is taking their place in the organization.

It is a classical problem and the biggest problem. Sales see that marketing has taken a bigger role in the process of buying, and they have shifted the decision-making from the organization towards the customer. It can be seen as a red cloth for sales because sales think that they are a glorified resource in the organization. (Expert 2)

Rather interestingly, companies, which were part of the group of interviewees, did not see a problem in attitudes, because they have combined their sales and marketing processes from the very beginning. All companies saw marketing and sales as the same process and mentioned that they have good communication between those departments. In addition, all companies and also experts mentioned that marketing automation could be seen as an integrative part between sales and marketing, because for marketing automation to work, there has to be communication between these two.

When marketing automation process is being built marketing should know how the sales funnel is composed, and on the other hand, sales should know how marketing funnel is composed. That way we can separate sales and marketing leads. ...I think that marketing automation is an integrative element here. (Company 2)

Problems with software were rather frequently mentioned in the interviews. All companies as well as the experts emphasized the importance of simplicity in marketing automation software and also how marketing automation is conducted. Company 2 and 3 said that common mistake is to make automation campaigns too complicated. In the short term, it might look like a good idea to try to serve as many customers as possible, but in the long term it might end up an uncontrollable whole, that is serving neither marketing nor sales.

When creating a marketing automation system, it should be simple from the very beginning, and it should include one main idea, which makes it easier to control and update it later. (Company 1)

Companies, as well as the experts, mentioned that it is still relatively common that companies send to their customer's emails and offers about

products that are already sold to the customer. This is usually a result of not up to date CRM system and problems with data collection.

Company 1 and expert 2 arise a good point in the selection process of marketing automation software. They address that marketing automation should be able to collect data in all channels, and it should be a tool for both, sales and marketing. It might even be the main CRM system for the company at the same time; thus it is a major decision and touches the entire company. In addition both of these mentioned that after the purchasing process of the automation software the real work starts, because maintaining the whole system requires a lot of effort.

The first thing is that you really think where you need the automation software, and where you will need it in the future. Another thing is that you understand that it is a choice of an ecosystem. It is a really big thing, and it is related to the even bigger matter, IT architecture of course. (Expert 2)

In addition to communication and software challenges experts and companies addressed the challenge in lead scoring. Data collection has helped in the estimation process of content and campaigns, but the difference between a sales qualified lead and marketing qualified lead is still a rather challenging task to solve. Again, this leads to a situation where sales and marketing should communicate when evaluating leads.

What is good quality content is always hard to determine. In automation, the challenge is that data is collected all the time, and lead scores are forming based on those, but when it is too complicated the whole process becomes overloaded. (Company 1)

The medium that is used in marketing automation is still in most cases automated emails according to experts as well as the companies. Marketing automation is already used in social media and e.g. in display marketing, but companies and experts are seeing other mediums than emails still a challenge to marketing automation. Challenges appeared in data quality and recognition of the customers.

When combined marketing automation the biggest challenges according to the interviewees are in processes, communication, and software, especially when marketing automation goes too complicated, and the whole process becomes overwhelmed.

4.4 The future of marketing automation in sales

According to the interviewees, marketing automation as a part of the sales process sales is still a relatively new solution for improving the lead quality, and the managerial side is still looking at marketing automation as a future

opportunity, not as such an established way of doing marketing. Expert 1 suggests that as soon as marketing automation reaches the point where it can be seen as mainstream, organizations will see it as a necessity rather than a thing that might be suitable for them. Expert 1 also addresses that marketing automation is suitable for all kind of companies, no matter B2B or B2C. The processes of marketing automation just have to be adjusted to meet the needs of the company.

Expert 2 sees the future in a way that marketing automation will continue facilitating sales, but at the same time reduces the number of the sales force.

Every single sales director that I have met says that increasing the cost of the sales force is one of the biggest problems in today's companies. And in every speech that I have given in the past years, I have said that in 2020 we will have 20% fewer sales force. This happens via learning, more is not more. Now we have to make things smarter, and that happens by decreasing the number of sales force, make them work more efficiently and use marketing automation to do it. (Expert 2)

Expert 3 sees the future in rather interestingly and says that the word marketing automation will be not used in a couple of years. This change is because of all software and data mining channels will be in one single cloud service and there is no need to separate the automation part anymore.

In two to three years no one will speak about marketing automation anymore. The conversation about automation will go towards big data and industrial Internet. Normal communication in a customer relationship will be more and more automated in the future. (Expert 3)

Interestingly company 2 stated that in the future marketing automation and artificial intelligence will reduce the need for sales force near nonexistence, especially in sales of immaterial.

Marketing automation will diversify, and artificial intelligence will be used. New methods for tracking will be available, and targeting will be easier. More and more personalized information will be available. All kinds of industries are using it. Geographical information is available, new mediums and cross-usage of services will be used. Most probably normal sales force will be unnecessary in the future. (Company 2)

Companies 1 and 3 are discussing the future of sales force in a more gentle way. They say that the need for sales will be there, and there will be no automation system that could replace personal touch in selling even though, both of these companies mentioned that artificial intelligence will be somehow related to automation, and the number of the sales force will decrease in the future. Company 1 addresses that in the near future reporting systems and data collection methods are playing a crucial role in the development of marketing automation and sales overall.

To conclude the future of marketing automation in sales, all companies, and experts are saying that the amount of automation is increasing all the time in sales and marketing processes and the degree of the sales force will go down. As an appointing factor, all companies and experts said that marketing and sales will go closer to each other and for example the sales funnels in sales and marketing are going to be the same in the future. Järvinen and Taiminen (2015) show a good example of a marketing and sales funnel in the chapter 2.4.

As a conclusion of all interviews, marketing automation as a supportive element in sales seems to be still relative young approach in the collaboration of sales and marketing. Practices are not yet established, and mostly larger companies are using marketing automation on a larger scale, smaller companies are eagerly starting their processes and can see the future in it. As a conjunctive factor, all companies and experts were putting a lot of emphasis on the collaboration of sales and marketing, and they all estimated the future of marketing automation nearly the same way.

5 CONCLUSION

The research of marketing automation supporting sales was conducted to get a better understanding of marketing automation processes in general both in B2B and B2C companies, and how marketing automation is actually supporting sales. Marketing automation is an emerging way of doing targeted marketing, but it has not yet established its place among the general public. Thus, marketing automation as a supportive element for sales appeared to be a rather interesting subject for conducting research.

The study included the theoretical as well as the empirical part. The theoretical part composed of four different chapters, which were digital marketing, CRM and data collection, marketing automation and marketing automation supporting sales. The theoretical part gave thorough groundings for the study by providing academic literature around marketing automation and available literature about automation supporting sales. The subject studied is not highly researched topic due to its age. Hence, all reliable academic literature was attempted to gather in this study.

The aim of chapter 5 is to compose a conclusion of the theoretical and empirical knowledge gathered in this study. Theoretical knowledge will be compared to the empirical findings, research questions presented in chapter 1 are answered, and managerial implications are given. The limitations and reliability of the study are evaluated as well as the future research questions are given in the end of this chapter.

5.1 Theoretical implications

The objective of the research was to find out how marketing automation processes work in companies and how those companies are utilizing marketing automation in their sales process. The research questions are answered below. The theoretical as well as the empirical findings are used to form thorough answers to the research questions. The initial goal was to be able to create a theoretical framework for marketing automation supporting sales. The figure

created by the author during the theoretical part (figure 6) created good groundings for comparing the answers between the theoretical and empirical findings. Based on the answers of the experts and companies the figure should show the content creation process due to its importance in the automation process. The content distributed in B2B and B2C processes differs, thus it should be shown in the figure. Also testing of different content in different channels should be included in the figure. These findings are separated with red color in figure 9. In addition, automation flow after B2B and B2C sale should continue due to relationship building according to the empirical findings.

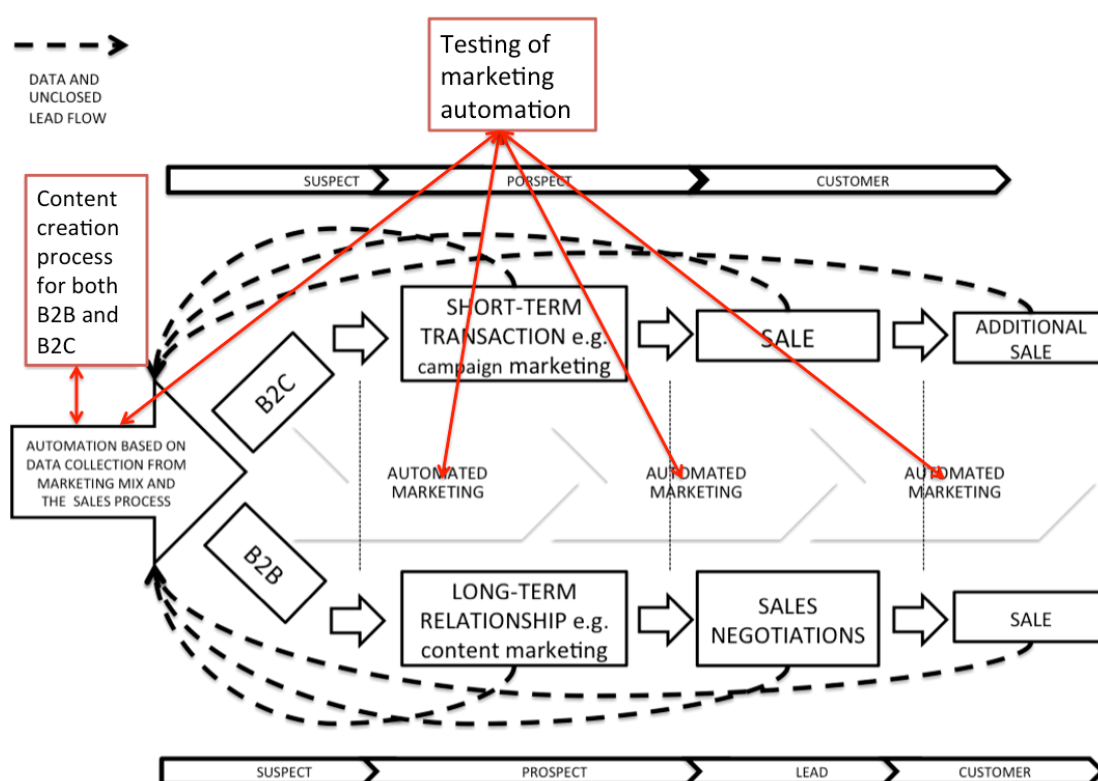


Figure 9 Automated marketing process in B2B and B2C with empirical findings included

RQ1: How is the concept of marketing automation defined?

As expected, the explanations of the concept of marketing automation varied on the level of details. The actual idea of marketing automation was rather clear to each interviewee. Heimbach (2015), Montgomery (2008), Rimmer (2013), Järvinen and Taiminen (2015) all explained marketing automation nearly the same way; marketing automation means automated personalization and customization of the marketing mix to meet the customers' needs. This

explanation was about the same among all interviewees. The only difference was that the term marketing mix did not arise during the conversations usually the term was content. As mentioned in the literature review and also in the empirical findings B2B and B2C marketing automation differ from each other. On the other hand e.g. company 2 is doing rather a B2B type of business than B2C although the customers are consumers. This is because of the price of the product, which makes selling and marketing processes more like B2B than B2C business process. Thus, more a general definition for marketing automation process is suitable in this case. Based on the literature review and the interviews of the case companies and experts a suitable general definition for marketing automation goes as follows:

Marketing automation means delivering compelling content on the exact channel, at the correct time, automatically.

The definition gives a simple image of the meaning and the usage of marketing automation, excluding the need for differentiation in B2B or B2C business.

RQ2: How does the process of marketing automation work?

In the literature review, Heimbach et al. (2015) described the marketing automation process in a rather clear way. At first, current and stored information is analyzed, the content is created, and rules for content delivering are determined after which the objects are customized and personalized, and finally the medium is selected. This is a rather simplified pattern how marketing automation works, and this simplified model is conforming the answers of interviewees also. In addition to this, the empirical findings reveal that the real process also includes testing. It is in a key role in marketing automation, thus adjusting content to match the customers needs is crucial. Testing requires a lot of communication between sales and marketing because the functionality of the leads and processes is determined based on the sales results. The process itself requires testing from marketing, thus it is in a key role.

All companies and experts emphasized the fact that marketing automation is there to improve sales, increase brand-loyalty and mitigates the workload of marketing. This can be found from the academic studies also e.g. Järvinen and Taiminen (2015). Hence, as a conclusion of the process itself, it is conforming the process of Heimbach (2015) and the objective as well as importance can be seen from both empirical and theoretical findings. Next, the premier subject of this study will be addressed.

RQ3: How does the marketing automation assist the sales process?

The marketing automation process itself is a rather simple process in theory but how does marketing automation assist sales. Next, the results of how marketing automation supports sales are presented.

Järvinen and Taiminen (2015) suggest that marketing automation is supporting sales by collecting data based on the actions of suspects, prospects, and leads. These actions can be scored and further utilized in marketing automation nurturing process, which purpose is to create better leads for sales to close deals. This process also gathers information for sales that can be used during the sales process. With the help of this process sales can intensify their work, when unnecessary sales actions can be avoided. Based on the interviews one of the most important benefits of marketing automation was exactly this.

Based on the theoretical as well as empirical knowledge a conclusion of the process how marketing automation is supporting sales, composes of four points. 1) The leads are more qualified because of the compelling and valid content that the specific customers are served with the help of marketing automation. In addition leads are not wasted because of the marketing automation system. Both, companies and experts addressed this. Expert 3 concluded this rather well.

We have marketing qualified leads and sales qualified leads. If the sales accept the lead, it becomes a sales qualified lead and if not, marketing will continue nurturing the lead. (Expert 3)

This affects straight to the amount of calling to customers who are not yet ready to buy and obviously mitigates the need for unnecessary work. 2) Sales have more information about the customers and their actions in CRM system due to the data collection of marketing automation. Heimbach (2015) emphasized the importance of data and how it is used when targeting right content to the right individual or group. Companies and experts both were addressing the importance of data and how it can be utilized in the sales process. The representative of the company 1 concluded the importance of data and initial knowledge of the customer well.

At the same time, the work of sales becomes easier and also more efficient, when the leads are closer to the actual transaction point. (Company 1)

3) Marketing automation enables sustaining customer relationship before and after the initial purchase. Dognim and Benbasat (2006) as well as Holliman, Rowley (2014) states that timely content effects to the success of marketing. In addition, interviewees stated that content distributed with the help of marketing automation develops a relationship between the customer and an individual. 4) Increases brand-loyalty among the customers. Expert 2 addresses in the interview that brand loyalty can be further develop when marketing can be personalized. In addition Sheth et. al (2015) addresses the benefits of personalized content in increase in brand loyalty.

5.2 Managerial implications

Empirical as well as theoretical findings are clearly advocating the rise of marketing automation as a supportive element of sales. The usage of marketing automation will become more common, and companies from all sectors start to use it to some degree. Businesses are using it to qualify leads and maintain the relationship with the customer and on the other hand, it can be used to reach large crowds, foster brand awareness, and loyalty. Figure 10 shows the most crucial factors that have to be taken into account when marketing automation is utilized as a supportive element of sales.

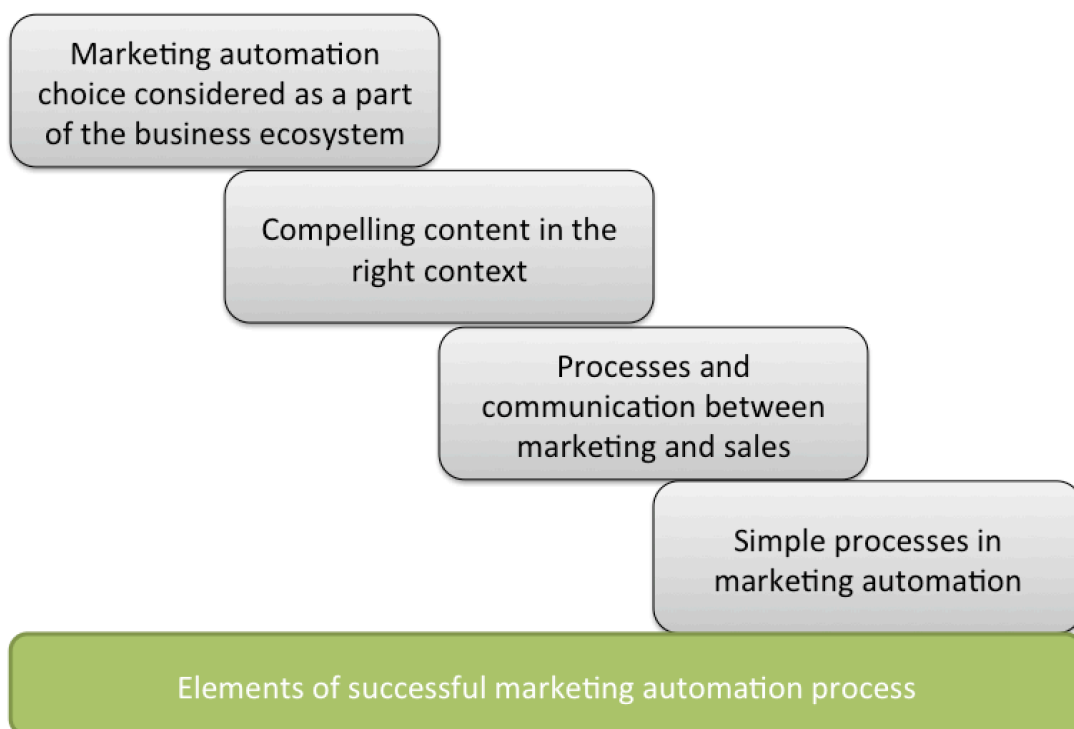


Figure 10 Factors affecting to the success of marketing automation

As seen in the research the communication between marketing and sales is highly important when marketing automation is being used especially in B2B side where sales representatives can have a physical contact with the customer. Content is obviously in a crucial part in marketing automation, but as it can be seen from the empirical findings, the context is as important as content. Good content marketing can be done without marketing automation, but marketing automation cannot be done without good content. Simplicity in marketing automation is definitely a point that has to be taken into account when creating a marketing automation processes. When too complicated it will become

uncontrollable and loses its purpose. Software should be selected all company departments in mind due to the fact that the automation needs information from all channels to be able to work in the best possible way. All in all marketing automation system is a major procurement, and it should be considered as an ecosystem choice.

5.3 Evaluation of the research and future research

According to Eriksson and Kovalainen (2008), reliability and validity are used to evaluate a qualitative research. By reliability is meant the extent to which the measure or procedure achieves the same result. By validity is meant the extent to which the conclusions of the research give a solid description of what actually happened. (Eriksson and Kovalainen, 2008)

Research companies were selected based on the initial knowledge of the author due to the fact that there is no official list of companies that are utilizing marketing automation as a part of their processes. Thus, there could have been some variation in answers if totally different companies would have taken part in the research. On the other hand, answers were saturating during the research, hence it can be assumed that there would not have been variation in the answers. Thus, the study can be seen reliable.

The aim of the research was to get an understanding how marketing automation is supporting sales, and the study was conducted in the point of view of a company. The study was able to give solid answers, and the conclusion of the study gives practical tools for companies to utilize in both stages: 1) when acquiring a marketing automation system and 2) when already utilizing it.

Future research questions

This research of marketing automation supporting sales was executed to get knowledge of the marketing automation advantages in sales. Thus, it creates a lot of opportunities for future researches also. To be able to get more detailed understanding a quantitative research of the effectiveness of marketing automation in sales would be an interesting study to execute. This study was executed by using qualitative methods from selected case companies. Thus, the answers are from a smaller group of companies and specialists, not from a larger number of companies.

The core idea of marketing automation is to utilize the data that is collected from the customers, and when that data is exploited it might seem to the customer that the line of privacy might be crossed at some point. A research of privacy from the customer point of view would give great value for marketing manager who creates the content and directs the automation. It would be interesting to know how much personalization and customization people are willing to accept.

Different channels where marketing automation software is collecting data would also be an interesting topic to make a research due to the differentiation between the information qualities between channels. During the interviews different channels were mentioned, and also that particular channels are creating better of information than others from the usability side. For example, the data collected from Facebook was not as valid as the data collected via emails according to expert 1.

In the academic literature marketing automation and especially marketing automation supporting sales is not a highly researched topic among academics, mostly due to the fact that it has not yet been established its place among all companies. Thus, it is important to continue researching this topic and create a sound framework how marketing automation is working and how it supports sales.

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APPENDICES

Appendix 1. Interview questions

Aloitus ja lähtökohtien kuvailu

1. Millä tavalla kuvailisit kehittynyttä myynnin ja markkinoinnin prosessia?
 - a. ko. yrityksen/henkilön tapauksessa

Markkinointiautomaatio

2. Mitä mielestäsi tarkoitetaan markkinointiautomaatiolla?
3. Mitä lisäetua markkinointiautomaatio tuo mielestäsi yritykselle/teille?
4. Mitä markkinointiautomaation hyödyntäminen vaatii yritykseltä?
 - a. sisällöntuottokyky?
5. Mitkä olisi suurimpia haasteita, kun ajatellaan markkinoinnin automaatiota?

Markkinointiautomaation ja myynnin yhdistäminen

6. Miten markkinointiautomaatio parantaa myynnin ja markkinoinnin yhteispeliä, vai parantaako se?
7. Miten markkinoinnin ja myynnin suppilot saataisiin yhteen?
8. Miten markkinointiautomaatio tukee yrityksen myyntiä teidän tapauksessa?

Suosittelut ja näkemykset

9. Minkälaisille yrityksille suosittelisit markkinoinnin automaatiota?
10. Voiko markkinointiautomaatio mielestäsi korvata fyysisen elementin myynnin osalta?
11. Onko tilanteita jolloin ei kannata edes harkita markkinointiautomaation käyttöönottoa yrityksessä?
12. Miten näkisit että markkinointiautomaatio tulee kehittymään tulevina vuosina?