ANTECEDENTS IN THE ADOPTION AND IMPLEMENTATION OF A NEW MARKETING AUTOMATION SOFTWARE

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ABSTRACT

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Abstract: Even though marketing automation is increasing its popularity especially within companies and organizations, the academic research on it is still limited. Marketing automation is a software that is used to manage marketing campaigns, channels and processes through automation. Similar information and communication technology (ICT) systems to marketing automation (MA), like customer relationship management (CRM) and sales force automation (SFA) have received great interest in the academic world, leaving a research gap to be studied with MA.

The goal of this research is to increase the knowledge of how MA software can be successfully implemented. To reach the goal, the antecedents of MA implementation and factors affecting the implementation process are identified. Moreover, the benefits and drawbacks of implementing MA are researched as well as any differences in implementation a MA and other ICT systems, including CRM and SFA. The study is conducted as a case study utilizing interviews and observations as data gathering methods. There are two interviews conducted with employees from sales and marketing departments of the case company. Additionally, the researcher worked in the case company, a Finnish B2B logistic solution provider.

To study the antecedents of MA, a framework by Muphy (2018) was adopted. After the research findings were constructed, the same framework was modified to answer the research questions presented early in the study. The rest of the theoretical background consisted of ICT adoption and implementation, social media and content marketing as well as the key concepts of MA, including cooperation between sales and marketing departments.

The findings of the study extend the existing research on MA and ICT implementation. The findings suggest that to successfully implement a MA platform, there are many factors that must be considered. The implementation process is highly dependent on having correct human resources, proper scoping and realistic goals over any other factors. Having these antecedents in place, the company adopting MA can utilize the learned skills in future software implementations as well. Furthermore, several similarities between different ICT software implementations were identified, such as a need for proper training and a need to understand why the software is implemented in the first place.

Keywords: Marketing automation, antecedents of marketing automation, social media, content marketing, marketing communication, business-to-business

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TIIVISTELMÄ

Tekijä Max Aaltola	
Työn nimi Uuden markkinoinnin automaatiojärjestelmän käyttöönoton ja toimeenpanon edellytykset	
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Tiivistelmä: Vaikka markkinoinnin automaatio kasvattaa suosiotaan erityisesti yrityksissä ja organisaatioissa, akateeminen tutkimus siitä on edelleen hyvin rajallista. Markkinoinnin automaation (MA) kaltaiset ICT-järjestelmät, kuten asiakkuuksien hallinta (CRM) ja myynnin automaatio (SFA), ovat herättäneet suurta kiinnostusta akateemisessa maailmassa, jättäen tutkimusraon markkinoinnin automaatiolle ja sen toiminnoille.

Tämän tutkimuksen tavoitteena on lisätä tietämystä siitä, kuinka markkinoinnin automaatiojärjestelmiä voidaan ottaa käyttöön onnistuneesti. Tavoitteen saavuttamiseksi työssä tunnistetaan markkinoinnin automaation toteutuksen edellytyksiä ja toteutusprosessiin vaikuttavia tekijöitä. Lisäksi selvitetään markkinoinnin automaation käyttöönoton hyötyjä ja haittoja sekä mahdollisia eroja markkinointiautomaation ja muiden ICT-järjestelmien, mukaan lukien CRM ja SFA, käyttöönotossa. Tutkimus toteutetaan tapaustutkimuksena hyödyntäen haastatteluja ja havaintoja tiedonkeruumenetelminä. Tutkimuksen kohteena olevasta yrityksestä haastateltiin kahta henkilöä yrityksen myynti- ja markkinointiosastoilta. Lisäksi tutkija työskenteli tutkimuksen kohteena olevassa suomalaisessa B2B-logistiikkaratkaisujen toimittajayrityksessä tutkimuksen tekohetkellä.

Markkinoinnin automaation edellytysten tutkimiseksi, työssä otettiin käyttöön Muphyn (2018) viitekehys. Tutkimustulosten rakentamisen jälkeen samaa viitekehystä muutettiin niin, että pystyttiin vastaamaan tutkimuksen alkuvaiheessa esitettyihin tutkimuskysymyksiin. Loput teoreettisesta taustasta koostuivat ICT:n käyttöönotosta ja toimeenpanosta, sosiaalisesta mediasta ja sisältömarkkinoinnista sekä markkinoinnin automaation keskeisistä käsitteistä.

Tutkimuksen tulokset laajentavat olemassa olevaa markkinoinnin automaation ja ICT-käyttöönoton tutkimuspohjaa. Tulokset viittaavat siihen, että markkinoinnin automaatioalustan onnistunut käyttöönotto edellyttää monia tekijöitä, jotka on otettava huomioon prosessin eri vaiheissa. Prosessin onnistuminen riippuu suuresti siitä, onko olemassa oikeat henkilöresurssit, oikea projektin laajuus ja realistisesti asetetut tavoitteet. Nämä edellytykset oppimalla markkinoinnin automaatiota hankkiva yritys voi hyödyntää opittuja taitoja myös tulevissa ohjelmistohankinnoissa. Lisäksi tunnistettiin useita samankaltaisuuksia eri ICT-ohjelmistohakintojen välillä, kuten asianmukaisen koulutuksen tarve ja tarve ymmärtää, miksi valittu ohjelmisto alun perin hankitaan.

Asiasanat: Markkinoinnin automaatio, markkinoinnin automaation edellytykset, sosiaalinen media, sisältömarkkinointi, markkinointiviestintä, yritystenvälinen kauppa

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1 INTRODUCTION

1.1 Introduction to the topic

When considering the fields of business that have been affected by new technologies, information age and rapid development of them, marketing can be considered as one that has been affected a lot.

Today's B2B marketers are facing more challenges than ever before. Their customers have a lot more information available, they have better access to it and thus can make better and more informed purchasing decisions. Concurrently, the purchasing power of customers has increased at the same time as the COVID-19 pandemic has created unanticipated challenges for both customers and companies. This has led to companies adapting new methods to meet the needs of their evolving customer base. For example, companies have had to create new processes, convert offline businesses to online and adapt new technologies such as MA software to overcome the challenges. (Vázquez-Martínez, Morales-Mediano, & Leal-Rodríguez, 2021.) Furthermore, according to Wiersema (2013), B2B marketers are today faced with two key challenges:

1. How to extract and leverage better customer and market knowledge
2. How to build stronger relations between marketing and other departments

CRM systems have been in use of companies for a while already, but today technologies like CRM software allow companies to have one-to-one relationships with an enormous number of customers (Payne & Frow, 2006). CRM software is often adopted to support different departments, like marketing and sales, increase the amount of customer data as well as to maintain the customer-company relationships mentioned above (Foss, Stone & Ekinci, 2008).

Foss, Stone & Ekinci (2008) also mention that CRM systems often involve or can be combined with other similar tools, such as SFA. SFA tools have been increasing their popularity by including increasingly beneficial features like automating sales processes, more effective management tools and integration possibilities with other departments of the organization (Barker, Gohmann & Faulds, 2009). In the big picture, it can be said that any automation or software is useful as they are implemented to save on resources or workloads, but also help companies become more competitive (Widmier, Jackson Jr & McCabe, 2002; Murphy, 2018). Still, even though there are a plethora of benefits included, many CRM/SFA/MA implementations end up failing for one reason or another. Reasons for this include, but are not limited to, managerial issues, lack of correct human resources, inadequate planning or scoping of the project and lack of internal interest (Honeycutt et al., 2005; Järvinen & Taiminen, 2016; Benz & Tanner, 2017; Murphy, 2018).

1.2 Key concept description

Key concepts of this study include MA, content marketing, social media, lead qualification and lead generation. In a comparable way as both CRM and SFA tools have evolved, so has MA. This evolvement of moving from focusing on email marketing to being able to run A/B testing, create landing pages and even automate social media platforms has been a great transformation, but it has happened much later than expected. Still, the difference between first MA applications and those of today is enormous and will most likely be even greater once the systems develop further. (Marketing automation Insider, 2015; Murphy, 2018.) Some larger MA software providers include Pardot, Marketo, HubSpot and Eloqua, who as the big players dominate the industry. Still, regardless of the company size, there seems to be an option available for practically everyone. (Woopra, 2022.)

MA is often connected with digital content marketing as well as content marketing itself. As with moth terms, there is some ambiguity to the definitions of digital content marketing and content marketing (Holliman & Rowley, 2014), but an example definition could be from Pulizzi and Barrett (2008, as cited by Holliman & Rowley, 2014, 271), who define digital content marketing as *"the creation and distribution of educational and/or compelling content in multiple formats to attract and/or retain customers".* Moreover, content marketing is considered as an inbound marketing technique, portraying a need for value-based content rather than promotional material. Multiple studies have shown the value of useful, timely and relevant content. (Holliman & Rowley, 2014; Järvinen & Taiminen, 2016.)

Like with all marketing related activities, MA requires vast knowledge of one's target group for it to be completely functional. Things such as what the target group is interested in, what platforms they use in their daily lives and who they actually are help with inbound marketing methods and content marketing mentioned above. As mentioned by Vaughan (2015), this creation of the ideal customer and buyer personas is the first thing any company should do when starting to use any MA platform.

Even though MA is often connected with content marketing and digital content marketing, it should never be completely separated from sales. MA is seen useful with sales as it helps in generating leads and in cleaning up the database as well as shortening the sales process. (Järvinen & Taiminen, 2016; Murphy, 2018.) On top of this, today MA is often connected with other tools, such as CRM and SFA to improve its usability even further. In academic research, this value of integrating sales and marketing functions has also received increasing interest (Rouziès et al., 2005). For example, Järvinen & Taiminen (2016) state that content marketing requires marketing and sales collaboration for it to be successful in a B2B setting.

Singh & Chanda (2014) argue that in B2B companies, lead generation process is often one of the integrators between marketing and sales departments. Singh & Chanda describe lead generation as a process of identifying potential customers, which can be done through multiple methods. For instance, leads can be generated by tracking a visitor on a social media page or the company website and offering them some type of material to be downloaded after the visit. After generating the lead, the sales department cannot go and contact it immediately, as they have to be nurtured first to build a better relationship between them and the company. A definition for nurturing comes from Järvinen and Taiminen (2016), who define it as a process, in which marketing leads (for example those who visited a website) are targeted with nurturing campaigns personalized for them, providing marketers with more information about leads. Singh and Chanda (2014) fulfill this definition by stating that in many nurturing campaigns, the campaign consists of multiple content blasts, such as emails. These in turn can qualify a lead to be contacted by the sales department.

A qualified lead, or one that is nurtured, can often be seen differently among different organizations. For example, some see a qualified lead as someone with massive intentions to buy a product while others see them as someone with a budget to do so, but with no clear purchase intentions. In any case, it is incredibly important to qualify leads as they represent the quality of any content put out and also saves money and efforts when the sales department is not spending their resources on leads not worthwhile. (Singh & Chanda, 2014; Oliva 2006.)

1.3 Justification of the study

Even though there have been ICT adoption and implementation studies before, these studies have been focusing on estimating the success of the implementation process and what happens after the adoption. In this research, the case company has just finished their implementation and have gathered data to portray outcomes of it. Furthermore, the focus of this study is more on understanding what are the antecedents of a successful B2B MA implementation and how different antecedents affect the overall outcome of the implementation process.

This study focuses on examining the implementation and adaption of a new (to the case company) MA software in a B2B company focusing on automated material handling and logistic solutions. The case company and its operations can be considered large, with operations and subsidiaries across the globe, over 400 personnel and annual revenue of more than 110M. Thus, the case company defines the study in a few ways: the case company gives the study a B2B perspective with a weight on large size businesses. It is important to note that even though the case company can be considered large, and the weight of the study is thus on large size businesses, the case company does not have vast amounts of information that has to be integrated during the implementation process. In this regard, this study also contributes to smaller businesses and businesses, who have limited amount of previous data.

The empiric study focuses solely on MA, rather than focusing also on CRM or SFA systems. This decision was made based on the fact that MA has received less interest from academic research than CRM or SFA have during the last years. Also, the case company acquired their new MA application to support and fulfill their CRM software. It is still important to note that the two systems are often interconnected and cannot be completely separated from each other.

In their study, Järvinen and Taiminen (2016) highlighted the need for future research especially with how MA could be used with social media and brand awareness needs in B2B settings. In this study, the B2B content marketing, including social media activities and creating brand awareness through social media of the case company are evaluated. This way the outcomes of this thesis also contribute to the suggestions made by Järvinen & Taiminen.

1.3.1 Objectives of the study

The purpose of this thesis is to provide a better understanding to how new MA applications are adopted within established companies or organizations. This objective is further supported by trying to identify the distinct antecedents of MA implementation and how they affect the outcome of any marketing software implementation project in a B2B setting. Furthermore, the research aims at understanding the main differences between implementing CRM, SFA and MA software and any benefits or drawbacks of such processes.

1.3.2 Research question

From the objectives of the study, the primary research question is formulated as:

How is marketing automation implemented in a B2B company?

The primary research question is also supported by additional research goals that aim at improving the understanding of the main question. First, the research tries to understand how the implementation process differs between MA software and other similar systems such as CRM or SFA. Following this thought, the research tries to understand the benefits and drawbacks of implementing a MA software. These benefits and drawbacks should become visible during the analysis phase of the thesis. Finally, to answer the main research question, it is crucial to study the different antecedents of a successful implementation process. This is done by utilizing a framework by Murphy (2018) regarding the antecedents of MA implementation. This framework is the main theoretical background used in this thesis and most of the analysis is focused on abductively reasoning whether or not such antecedents are the key for success.

As mentioned, the main research question and the supportive research questions are based on the objectives of the study and formed based on the literature review and research about ICT system implementation and adaption. This study contains literature about CRM, sales SFA and MA systems.

1.4 Structure of the study

This study contains five main chapters: introduction, literature review, methodology, research findings and discussion. Appendices and references are presented in the end of the study.

Literature review consists of ICT adoption and implementation, CRM and SFA systems (chapters 2; 2.1 & 2.2) and MA. In chapter 2.3 on MA, the concept of MA is opened further. In this chapter, the concepts of content marketing and the integration of sales and marketing departments are introduced. The seven antecedents of MA implementation are categorized to pre-implementation, post-implementation and spanning both and are presented in chapter 2.4.

After the literature review, methods of research and data gathering are introduced in chapter 3. Chapter 3 also comprises the case company description. Chapter 4 includes the findings from the research and are categorized and analysed based on Murphy's (2018) framework on the seven antecedents. Thus, the findings are also categorized under pre-implementation, post-implementation and findings spanning both.

In chapter five, discussion, the theoretical contributions, managerial and other implications and study evaluations are presented. Finally, the study is evaluated through finding out any limitations and by suggesting future research possibilities.

2 ICT ADOPTION AND IMPLEMENTATION

Duh, Chow and Chen (2006) state the effect that new and advanced ICT have had on companies is immense. The new ICT technology have changed how companies collect, analyse and distribute information. This has in turn lead to an increased popularity of ICT technologies in research.

Like with all new acquisitions, ICT technology has to be first adopted and implemented before usage. This study will be following Bouwman et al.'s definitions of adoption and implementation. Adoption is thus defined as *"the phase of investigation, research, consideration and decision making in order to introduce a new innovation in the organization."* (Bouwman, Van den Hooff & Van de Wijngaert 2005, 10.) The adoption phase can thus be considered as a part of the decision-making process, in which the organization evaluates, defines and researches the possibilities on the market, compares them with each other and decided on the choice to adopt the ICT technology or not.

Implementation is defined by Bouwman et al. (2005, 10) as:
"The phase on 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 is always a part that should be taken seriously as without proper implementation, the ICT acquisition process may get completely cancelled or otherwise fail. It is also important to note that during implementation the ICT technology may even get rejected, leading to the aforementioned cancellation. Usually, implementation is seen as the following step right after adoption and as a predecessor of usage.

To summarize, the adoption and implementation of new ICT technologies and other technological systems have an influence on organizations and the processes within them. Organizations have a lot of moving parts and implementing new systems, like ICT, are often made to improve some aspects of the company or initiate organizational changes. And even though some implementations may end up with unhoped-for changes or outcomes, many of them offer opportunities unthought of or match some needs the organization did not know needed attention before the process. (Bouwman et al., 2005, 5.)

2.1 Customer relationship management

There are various definitions for CRM. According to Payne & Frow (2006), usually CRM is defined narrowly as the implementation of a technology/solution project or a combination of multiple customer-oriented solutions. In the same study, Payne & Frow also mention a more strategic approach to defining CRM and highlight it as a strategic approach to improve shareholder value by developing relationships with them. Additionally, Zablah, Bellenger & Johnston (2004) defined CRM from a process perspective, defining it as an ongoing process that includes development and gathering market intelligence to build and maintain a selection of valuable customer relationships.

It is also possible to completely detach the definition of CRM system from the definition of CRM itself. For example, Foss, Stone & Ekinci (2008) mention that the CRM systems are technological business management tools that are a part of an overarching CRM strategy. The systems are in this scenario used to utilize customer data to nurture, reinforce and preserve relationships with customers. The data can also be used to improve customer targeting, guide in handling unprofitable customers and even customize the offering and marketing communication.

In the last decades, the significance of CRM has increased promptly. Companies have increased the amount of investments towards implementing CRM software but still many of these implementation projects end in failure. (Foss et al., 2008; Nguyen et al., 2007.) One reason for this is the fact that, as mentioned before, CRM implementations and projects are seen too narrowly (Foss et al., 2008).

Even with failure as a possibility, CRM systems have become highly important for today’s companies for the benefits they bring with them (Nguyen et al., 2007; Becker, Grever & Albers., 2010). Nguyen et al. (2007) state that CRM systems often help with tracking customers, their interactions with the company, saving the information received in one place and with utilizing the saved information to improve customer relationships. There is a plethora of industries that can utilize CRM already, but its usefulness also depends on other factors such as the amount of customer contact. For example, a company that has a big gap between its personnel and the end customer has less use for a CRM system than a company that is close to their customers. Still, CRM implementation is often recommended for the benefits above, as well as to potential increases in customer loyalty, customer service enhancements as well as organizational benefits such as learning. (Nguyen et al, 2007; Becker et al., 2010.)

According to Bohling et al. (2006), adopting a CRM system can and should change the way the company sees its customers. It is also important, as mentioned by Foss et al. (2008), that employees of the company are open to learn the new system and the methods it brings. This also means that companies looking to adopt a CRM system, or a CRM strategy should assess how they fit into the current business strategy; this helps in clearing up the purpose of the adoption and the gap in the current processes the new system would fill. Afterall, CRM implementation is the most effective when the strategies of the system and the rest of the business are linked. Some functions companies can focus on when implementing a CRM system include customer acquisition, retention and maintenance to name a few. (Nguyen et al., 2007; Bohling et al., 2006; Becker et al, 2010.)

2.2 Sales force automation

SFA is used to ease or improve sales tasks such as finding new prospects, making sales presentations, contact management and regaining information about the products and services on offer (Widmier, Jackson & Brown McCabe, 2002). As mentioned by Honeycutt et al. (2005), SFA utilizes information technology to increase the efficiency of the mentioned sales tasks. Furthermore, SFA can be used to support the strategies in place for CRM purposes (Speier & Venkatesh, 2002; Honeycutt et al., 2005).

According to Widmier et al. (2002), the combination of using SFA and CRM tools has a lot of valuable benefits. This combination can help in simplifying the sales process by making it more efficient and reducing the amount of work needed, it can improve customer relations, productivity, improve sales revenue tracking and even close down any reporting gaps. In the same study, Widmier et al. discussed that SFA is especially valuable when there is a lot of scheduling, proposal generation and management in place, but not as valuable for planning of sales, schedules and global routes. In any case, the amount of knowledge the company has increases after adopting a SFA system (Buehrer, Senecal & Bolman Pullins, 2005).

On top of the benefits mentioned above, adopting a SFA system has a deep, long-lasting impact on the overall sales force of a company. It changes the way sales departments operate, their strategy of business and even how the sales department is formed. (Honeycutt et al., 2005.) As mentioned by Murphy (2018) and Parthasarathy & Sohi (1997), the decision to adopt any new software needs to be made with a lot of care and thought as it requires a lot of time, money and effort from multiple departments. There are often many problems with, for example, the strategy regarding the implementation and with how to measure the system's benefits overall. These and other antecedents of implementation act as a supportive question for this thesis and as the main theory on which the results are built on. The antecedents are presented later in the study.

2.3 Marketing automation

Even though, as mentioned by Heimbach, Kostyra & Hinz (2015), MA is usually linked with other similar tools and means such as CRM, email marketing, direct marketing and digital marketing, the concepts cannot be defined completely as MA. MA includes a combination of these tools and means. They are utilized with numerous data sources and channels to simplify and automate the processes, such as email marketing.

By utilizing MA correctly, the user can end up with enhanced retention and conversion rates as well as cross- and up-selling rates. The extent of these enhancements depends on not only the usage of the software, but also the market and business to name a few touchpoints. For example, B2B marketers often have better customization possibilities when compared to B2C marketers, making MA especially valuable and cost-saving for B2C scenarios. Still, as this thesis studies the successful implementation of MA within a B2B context, the usefulness is often evident regardless of the business setting. (Heimbach et al., 2015.)

The main reason most companies implement a MA application is the benefit automation brings. If, for example, the company has hundreds of thousands of customers and visitors, it would be an endless task to manually go through all the tasks and actions required to manage those customers. Not only would this be time consuming, but it would also be highly inefficient, costly and difficult for managers to follow-up on. With MA that is set up correctly, the system does the work for the employees and the company. (Heimbach et al. 2015.)

MA is thus all about the customers, actions and monitoring them. This is usually done by capturing behavioral customer data when a customer acts in a specific way (clicks something, visits a website etc.), a certain marketing action must follow. (Heimbach et al., 2015.) It is, though, up to the employees and the company to set the actions for the automation to operate on. As Järvinen & Taiminen (2016) arque, MA schemes are only as clever as their users are.

Heimbach et al. (2015) provided an example of a general process of MA. This process is represented in Figure 1 below. An example of this process could be something like the following: when a website visitor downloads a white paper and at the same time submits their contact information, they subscribe to receive a content of their liking. The white paper (customized object) is then automatically delivered to the lead's email (medium) without any extra, manual work from the company. This example is based on the current information (behavior on website), but other triggers can also happen based on stored information and learning from the customer's behavior.

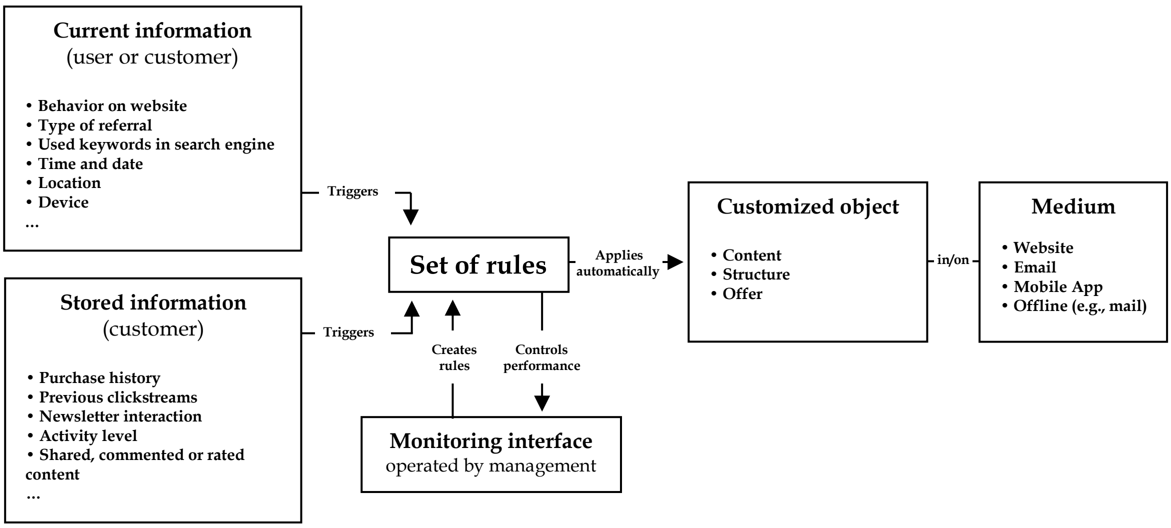

FIGURE 1 Process of marketing automation (Heimbach et al., 2015)

By adapting Järvinen & Taiminen's (2016) MA process with the previous example of a white paper, the lead who has downloaded the white paper starts to receive some other content, like a newsletter after the download. From the newsletter, the lead can be then further directed to multiple mediums, such as a social media channels, through links the MA software can track. When clicking to the social media channel, the automation software tracks the lead's navigation path and generates a more thorough picture of what the lead is interested in. This data can then be utilized to send more targeted information and to react to the lead's specific needs. Of course, this process is repeatable and can be done many times to gather as much information as possible. After being nurtured enough, the lead can be asked whether they would like to be contacted by someone in the sales organization; if the answer is yes, the lead becomes a sales qualified lead ushering the sales personnel to contact them.

The MA software should always be used in different stages of the combined marketing and sales funnel. With recognizing where the contact is on the funnel, the company can better target the content for the contact's needs. This stage can always move either backwards or forwards in time and should never be completely stable. (Järvinen & Taiminen, 2016.) It is also important to note that all the activities are not based on the actions of the contact or depend on optimization. These actions are nevertheless useful since they can reduce the costs by making marketing more efficient or improve the overall customer experience. (Heimbach et al., 2015.)

Finally, as mentioned by Heimbach et al. (2015), there are three main essentials for efficient use of MA:

1. Data storage is necessary to collect user and contact data in one easily accessible place.
2. There is a need for software that permits its user to create and execute rules.
3. The user of the MA software has to have expertise in marketing and computer sciences and the system itself should have an intuitive user interface.

The first two essentials are often met in only one system, reducing the amount of system software needed. It also helps, if the user of the system is capable of knowledgeable of the field of psychology, information systems and marketing as these fields are often combined in the use of a MA software.

2.3.1 Social media and content marketing

When it comes to social media and content marketing, it is a widely known fact that digital marketing tools are efficient for relationship building, brand status improvement and customer attraction. With content marketing, this is often done through inbound marketing methods of understanding the audience and creating content that is valuable for them leading in the relationships of mutual understanding and benefit. Even while being considered as an inbound marketing method, content marketing can also have goals of increasing sales and lead numbers. Thus, content marketing should be always considered and measured like other marketing activities. (Järvinen & Taiminen, 2016; Holliman & Rowley, 2014.)

In their study on MA, Heimbach et al. (2015) stated that content marketing is connected with intense personalization and customization. Nowadays, both

B2B and B2C marketers can utilize information technology like CRM and MA to aid them in targeting customers with content valuable for them. The IT tools available also allow for more efficient targeting, which is more often done as behavioral targeting, focusing on the mentioned factors of personalized content and even locational GPS tracking (Winer, 2009). These tools also have caused a need for research on the negative effects of their usage (Lee & Rha, 2016), and how marketers should encourage technology competence as well. To fully utilize personalized content, companies should thus evaluate and even anticipate the needs and wants of their customers and base their marketing mix elements on the information gathered (Montgomery & Smith, 2009). All of this can be summarized as the personalization of marketing mix activities and considered as one of the main elements of successful MA (Heimbach et al., 2015).

Social media has allowed companies to alter their ways of interacting with their customers in unforeseen ways, while also allowing customers to communicate among each other and employees to represent the company they are working for (Huotari, Ulkuniemi, Saraniemi & Mäläskä, 2015; Mangold & Faulds, 2009). There are multiple different channels available for this communication to happen in, including emails (both company-consumer and consumer-consumer), blogs and chat rooms, websites created for product and service ratings, social media sites as well as discussion forums. With the vast number of possibilities social media offers, companies can provide more to their customers in the manners they seem the best fit. At the same time, though, the companies lose the complete control of what is said of them or what is shared and experienced. Some ways companies can influence the conversation and brand image on social media are to provide the platforms of discussion themselves, by creating interesting and timely content and by supporting their customers through e.g., loyalty programs. (Mangold & Faulds, 2009.)

Similar to Mangold & Fauld's discussion, Huotari et al. (2015) found out that companies can affect social media content by adding it themselves, by controlling the social media presence of their employees and by participating in discussion with their customers on the social media platforms. It was also said that rather than by directly controlling what employees post on social media, companies should train their employees regarding social media. This can often lead to posts that are beneficial for the company image and relationships that advance the company's portfolio overall.

2.3.2 Aligning sales and marketing

As mentioned by Järvinen and Taiminen (2016), it is particularly important to understand the alignment between marketing and sales when it comes to content marketing and thus MA as well. There have been multiple studies focusing on the subject, most agreeing that it is invaluable to improve the interconnectedness of the two departments. Aligning the two functions is essential for every company, at least on some level, but is especially important for companies that have high customer concentration (Rouziès et al., 2005; Rouziès & Hulland, 2014).

As Rouziès et al. (2005) argue, the sales and marketing departments often have differing beliefs resulting in difficulties between and in aligning them. With varying personalities and opinions of the employees working within marketing and sales, the differences may even cause conflicts (Rouziès et al., 2005; Le Meunier-FitzHugh, & Piercy, 2010.) Managers often neglect the usefulness of integration; accusations are made from marketers' side that sales personnel focus too much on particular clients and sales accuse marketers of not providing enough customer data. Missing the connection between sales and marketing can, in the worst scenario, also lead to highly inefficient work environment by lengthening the sales process and thus the costs related to it as well. (Le Meunier-FitzHugh, & Piercy, 2010; Kotler, Rackham & Krishnaswamy, 2006.)

Even though this confrontational setting between marketing and sales can be hard to resolve, there are always ways to make the two functions more aligned. Companies that take note of these possibilities often achieve better results (Oliva, 2006). The approach always should depend on the company and its operations, size and culture to name a few touchpoints, but in many cases, there is a plethora of different solutions to consider. For example, Banerjee and Bhardwaj (2019) suggested different compensational models that are based on uncertainty levels and lead generation methods with positive results in multiple different scenarios while Rouziès & Hulland (2014) found other bridging mechanisms like power distribution helps with improving the social capital of the departments. It should be noted, though, that sometimes it is even better to have the gap between marketing and sales to avoid situations where the two departments become too alike, hindering e.g., the reaction speed to market changes. (Rouziès & Hulland, 2014.)

In the figure below proposed by Järvinen and Taiminen (2016) is a marketing and sales funnel that would tie the two operations, marketing and sales, together (Figure 2). The funnel establishes connection between the two operations by passing leads from marketing to sales: from MA software to CRM systems. This integration often does require some sort of IT integration to be fully effective.

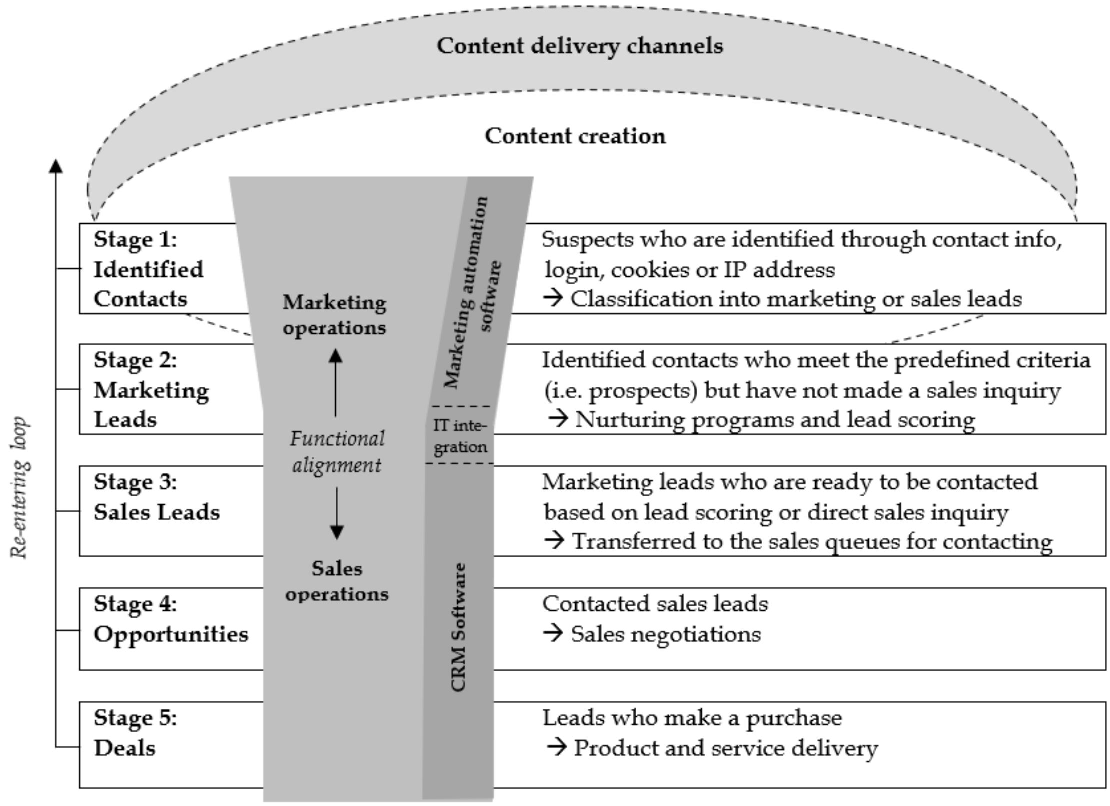

FIGURE 2 Sales and marketing funnel (Järvinen & Taiminen, 2016)

The actual funnel itself has five phases/stages:

1. Identified contacts – contacts are identified through contact information, login, cookies or IP address.
2. Marketing leads – when the identified contacts are ready, they can be nurtured into marketing leads and eventually sales leads.
3. Sales leads – after being reviewed as sales leads, the leads are transferred into sales queues for contacting.
4. Opportunities – stage 4 consists of all the leads that have been contacted in one way or another. After contacting, some opportunities move to deal phase through successful sales negotiations.
5. Deals – at this stage, the sales teams are enthusiastic to close a deal and turn the lead into a customer with a purchase.

The funnel is very versatile in what actions are to be taken in the different stages. Depending on the product, industry and even the buying process itself, the stages can take highly varying time periods to move through. Some industries have faster processes with deals happening in a rapid pace while in some industries the deal lasts up to years to finalize.

2.4 Antecedents of marketing automation implementation

Within many companies, adopting and implementing new ICT systems is often seen as a solution that fixes problems with limited drawbacks. For MA and other similar software, the truth is often different. For example, Act-On (2016) reported in their study on B2B MA that up to 15% of respondents evaluated that their MA application is ineffective and that they have not seen substantial results from its usage.

Through his research review, Murphy (2018) identified seven antecedents to successful MA implementation. Murphy categorized these seven antecedents to three distinct phases of pre-implementation, post-implementation and one phase that spans both phases. The framework (Figure 3) represents the seven antecedents and is utilized as the main framework of this research, aiding in investigating the factors for successful MA implementation. In this chapter, the seven antecedents are portrayed in the phases presented in the Figure 3 below.

Even though Murphy's (2018) model does not directly comprise other success factors, such as impediments (see Honeycutt, Thelen, Thelen & Hodge, 2015), these can be thought of as sub-parts, equals or results of the antecedents mentioned. For example, correct scoping of requirements is seen as an antecedent whereas incorrect scoping could be seen as an impediment. This close connection of factors leading to success and failure has been evident in previous research as well, as mentioned by Foss et al. (2008).

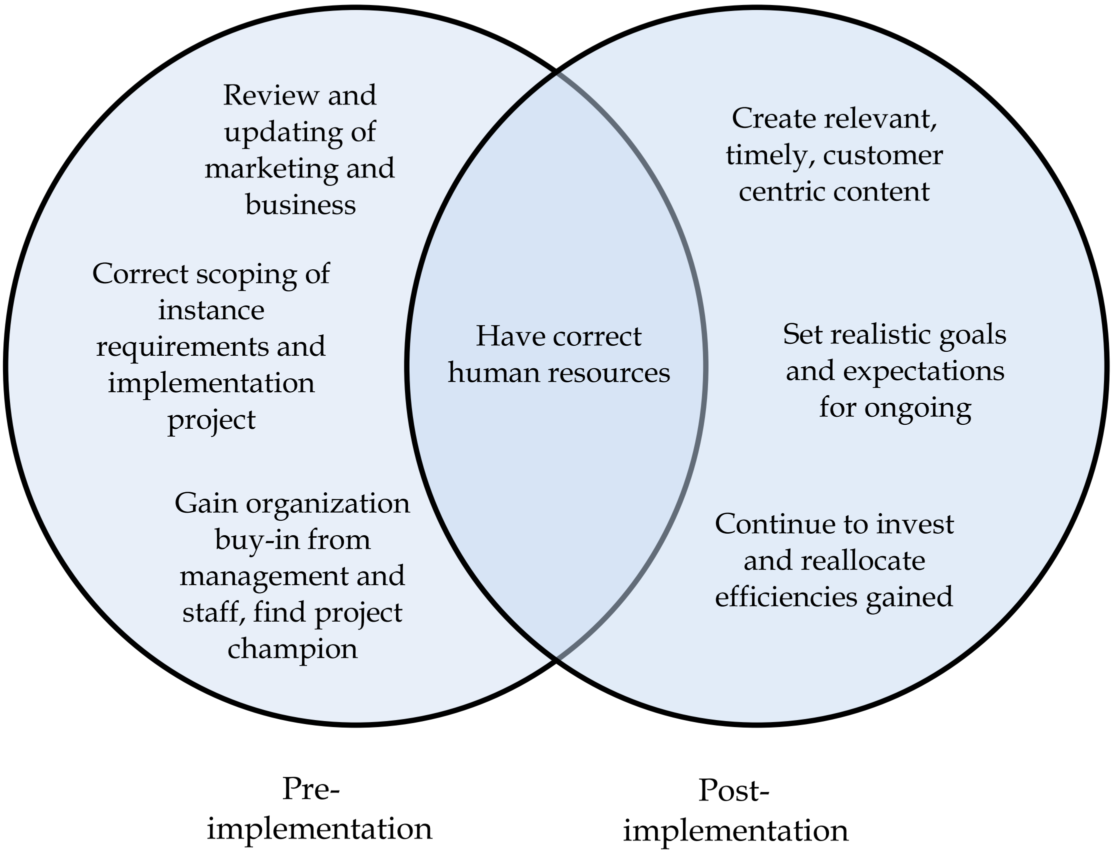

FIGURE 3 Seven antecedents of marketing automation success (Murphy, 2018)

2.4.1 Pre-implementation

Like with all implementation and adaption processes, pre-implementation efforts can be considered as the most impactful for the overall outcome of the process. Within his study, Murphy (2018) recognized three pre-implementation antecedents that were found the most impactful among previous studies regarding implementation.

The first antecedent of reviewing and developing internal marketing and business processes has already been mentioned in this study as well, but as, for example, Benz and Tanner (2017, 1) mentioned it: *"Anecdotal evidence suggests that executives possess an irrational belief that a technical solution will fix decades of lax processes and procedures."* This train of thought of fixing or improving processes can in the worst-case scenario be destructive not only for the implementation process but for the overall business as well. Many times, companies and executives still do this though, leading in failures in software implementations and processes. (Luftman, Lewis & Oldach, 1993; Murphy, 2018; Wood, 2015.)

As mentioned by Xu, Yen, Lin & Chou (2002), companies considering implementation should thus focus on understanding the requirements to have a successful MA implementation. These requirements include, but are not limited to, strategical, human resource, technological and marketing process changes, as all these influence how new software implementations fit in the current business

(Doyle, 2000; Xu et al., 2002; Wood, 2015). The focus on these internal changes is mandatory in almost every business process there is and often the results even span across multiple different processes/scenarios.

If done correctly, the right amount of governance and review during changes can lead to a competitive advantage for the company (Brinker, Heller & Seitz, 2018). For example, if two companies aim to implement the same MA platform and only one of the companies spends resources and time on evaluating the process changes with the new software, the competitive advantage should be self-evident after the implementation processes. With less hassle and better understanding of the entire process, the company with the governance in place should at least in theory have better ideas of the opportunities the new software brings with it. (Luftman et al., 1993; Redding, 2015; Wood, 2015.)

The second pre-implementation antecedent can also be considered as a crucial step if one wants to succeed in the software implementation process. The second step of conducting proper scoping benefits greatly from correctly executed governance and development done during antecedent one. Consider, for example, if a company starts to scope a project without putting in the work towards the backbone of the whole process; the project itself might not fail, but it certainly has way higher chances of doing so. As mentioned by Binker and Heller (2015), this focus on structural elements should always exist before starting any type of process.

Once the backbone (structure, environment, marketing processes) is secure, the company considering implementation should scope costs, the implementation process itself as well as the functions the new software is considered to provide help with (Jena & Panda, 2017; Murphy, 2018). By getting an understanding of software requirements and conditions, the overall goals and objectives and even an estimate schedule, the company increases their chances of successfully carrying out the implementation project. For example, a company with proper scoping might end up realizing they are in need of a CRM tool instead of a MA tool, saving them in costs on multiple ends. (Nasir & Sahibuddin, 2011; Jena & Panda, 2017.)

Even though there are multiple studies pointing towards the usefulness of proper scoping, many companies still miss this step completely when implementing a new software solution (Benz & Tanner, 2017). This lack of precision and care for a project can eventually lead to poor cost and risk estimates, inferior performance of the software and usage, a failed project or even a drop in the overall performance of a company or an internal organization like the marketing department (Whittaker, 1999; Gunasekaran, Love, Rahimi & Miele, 2001). On the other hand, as mentioned before, properly done scoping can not only improve the chances of successful implementation but also have a withstanding impact on the other parts of organizations such as performance and employer satisfaction (Gunasekaran et al., 2001; Murphy, 2018).

The third and final pre-implementation antecedent from Murphy's (2018) findings, gaining organizational buy-in and finding a project champion, has effects on practically all stages of an implementation process. With organizational buy-in, Murphy refers to receiving an agreement to proceed and according to him, this is especially important from internal management and staff. The same importance was also presented by Whittaker (1999), who mentioned that for a software project to succeed as planned, top management's support and involvement in the process is invaluable.

In a similar way as antecedents one and two interlapped, antecedents three and two share similar issues and goals. For example, by efficiently scoping out an adequate budget, correct resources and building a robust business case plan out of them helps in the buy-in process of this stage. (Lin et al., 2018; Murphy 2018.) This is also evident from other studies focusing on antecedents, pointing out facts like the value of alignment and commitment of supervisors and staff, realistic plans and schedule as well as overall education towards technology (Whittaker, 1999; Gunasekaran et al., 2001; Gheni, Jusoh, Jabar & Ali, 2017) increase the chances of accomplishment.

Murphy (2018) also highlighted the need to have a proper project champion, or a project leader. In short, a project champion is someone who takes a lead in the project during its runtime and acts towards having as successful of a project as possible. Having a project champion helps in, for example, staff alignment, facilitation and expectancies (Neufeld, Dong & Higgins, 2007) which in turn aid the overall process performance (Shao, Feng & Wang, 2017; Lin et al., 2018). According to Lin et al., (2018), having a project champion is extremely influential for any project and once chosen, they should take part in all parts of the process.

Research has also found out that organizations should invest in training and developing the skills of not only the management and the project leaders but also the rest of the staff. Sometimes, the implementation might even require adopting new staff and this is often even recommended. (Rezvani, Dong & Khosravi, 2017; Obal & Morgan 2018; Murphy, 2018.) While the training and a charismatic project champion may change the initial attitudes of staff, the technology must always be accepted before it can be truly used. For example, if the sales team is portraying a lack of need for the new MA application, sometimes a bigger change during antecedent one may be needed. (Hassandoust, Techatassanasoontorn & Tan, 2016; Murphy, 2018.) Potentially, this could mean something like a move to the combined sales and marketing funnel by Järvinen and Taiminen (2016).

2.4.2 Post-implementation

As can be expected, implementation does not fully end after the system is in place, but the process has merely started. After the new CRM/MA/SFA system has been set up, there are three antecedents that Murphy (2018) identified in his study to help in bringing the project to the level it deserves.

The first post-implementation antecedent should be clear for most companies, assuming they have done proper scoping and checks during pre-implementation; creating and delivering timely content that is relevant to the customers. The usage of relative and timely content should always be one of the first implementations with a new MA software. In their research, B2Bmarketing.net and Circle Research (2015, as mentioned by Murphy, 2018) found out that the lack of immediate content implementation slows down the prospect engagement process from months to even years. It should be also remembered that this is especially crucial for MA platforms, as they are implemented to ease interaction and engagement with the company's audience.

When executed appropriately, having the time-relevant and correct content highly increases both the quality of leads and the number of opportunities won (Järvinen & Taiminen, 2016; Mangold & Faulds, 2009; Murphy, 2018). A good example would be from Järvinen & Taiminen (2016), where the company studied targeted their customers with the punctuality and quality, leading in better leads than ever before. This right content at the right time-mentality can also be carried over to other functions of the company and can thus be utilized in also more traditional marketing like events or billboard marketing. In most cases, the results speak for themselves with more effective marketing and as said, better-quality leads. (Wang, Malthouse, Calder & Uzunoglu, 2019; Järvinen & Taiminen, 2016; Murphy, 2018.)

Still, with the vast amount of reliable research available supporting the relative and timely content, many companies are still overlooking these during new software projects. In the worst-case scenario, the company may end up turning away potential leads and prospects by bombarding them with promotional material that the recipient does not find valuable. (Westergaard, 2016; Järvinen & Taiminen, 2016; Murphy, 2018.) Therefore, companies should always utilize and analyze the data available for them, ask for feedback if necessary and even try to increase the interest-factor of the content internally (Ghanadan, 2018; Järvinen & Taiminen, 2016). With this "data-driven, best-practice approach" (Murphy, 2018, 6), the goal is always to provide customers with what they need and to solve their problems rather than to somehow promote the company and its products.

The second post-implementation antecedent is to set realistic expectations and not to rush with results. A study by Ascend2 (cited by Murphy, 2018), found out that over half of respondents implementing a MA software anticipated benefits from the new system within six months of implementation. This is a common mistake, and companies should avoid doing it to increase the probability of understanding the value of the platform. As mentioned by Järvinen and Taiminen (2016), the benefits of having a MA application do come in time, but it requires efforts and even monetary investment to happen.

As mentioned before in this thesis, many managers still set unrealistic goals at the beginning of any implementation process. These unrealistic goals might be due to higher management pressure or even personal will to bring forward results (Vranica, 2017), but they almost always lead to unwanted results. Instead of setting these end-goals that cannot be matched, companies could set smaller goals along the implementation path, increasing not only the probability of success but also the moral of the staff involved in the implementation process (Biegel, 2009; Murphy, 2018).

The more time companies give themselves with a new MA platform, the better. Experimenting with the tool, coaching staff to utilize the tool and promoting the use of thought and personal skills all help with the implementation and buy-in. If such processes are in place, the company could also see it becoming more innovative overall, with more experimental and potentially time saving protocols in place. (Brinker & Heller, 2015.)

The third post-implementation antecedent somewhat overlaps with the previous one, as it suggests continual investments and reallocations of both funds and the efficiencies found during the process. These efficiencies are always dependent on the company, the field of operation and the overall maturity of both, but in most cases, some are always found, and they should be focused on at this point – if not already in the beginning. (Murphy, 2018.)

Companies often invest in MA when they see it adds value to their operations and increases the efficiency of, for example, marketing and sales departments (Doyle, 2000; Järvinen & Taiminen, 2016). Often, when implemented properly, MA can also be seen as a replacive tool, meaning that it can replace some staff members of the marketing department (Järvinen & Taiminen, 2016). Again, this is only the case if there are an abundance of staff already available within the company. In any case, this can and should be seen as an example of an efficiency to which managers should invest or reallocate their resources to. For example, if a new MA software replaces some staff from creating email content, they should be educated and reallocated to operate the content algorithms of the MA software rather than just laid off.

Finally, companies should always consider where the most appropriate investments and reallocations are needed. The amount of these will usually increase as the company and the systems it uses mature, but the options should do so at the same time as well. As business is often about making profit, companies should thus focus on the options that are the most cost beneficial. (Jena & Panda, 2017.) Some examples of potential investment options include system enhancements, supporting investments to different departments or increasing human resources (Murphy, 2018).

2.4.3 Spanning both

As mentioned by Benz & Tanner, (2017), automation (including MA) cannot ever replace any elements that require human supervision and control. For example, any automation could not possibly replace highly trained and intelligent staff members who have the imagination, will and human skills to run promotions that meet all their customers' needs. Consider a simple email campaign for example: sure, the MA application can send, analyse and even create new similar campaigns, but before all that the system needs a strategy to work on, developers to code its actions, content to publish like images, videos etc. and practically any combinations of these. (Murphy, 2018.)

With any implementation or adaption process, getting the correct people to run the systems is a crucial factor. Getting the wrong people might cause a complete failure, while also reaching the right ones can be a challenge that is hard to overcome. (Mohagheghi & Jørgensen, 2017.) Regardless of the size of the project, this is always the case, and therefore Murphy (2018) highlighted the need for correct human resources as the one antecedent spanning all antecedents.

As already mentioned above, many companies do indeed require additional resources and training possibilities to successfully implement a MA platform. This can and should be done through the experimental learning methods and encouraging incentives to increase the willingness to learn something often completely new. Sometimes teaching is not enough, and new staff is required to run the new system. In these cases, it is highly beneficial for the company to hire personnel who are either skilful with the new system, have the ability to learn the system in a fast pace or have some background in digital marketing and/or MA. (Järvinen & Taiminen, 2016; Murphy, 2018.) All this is beneficial when the software is in full usage and when considering the content that is seen valuable for the customers, leading in better leads and prospect quality.

Finally, as mentioned by Jena & Panda (2017), sometimes training existing staff or bringing up new talent can be difficult due to multiple reasons. Furthermore, a new MA software almost every time requires existing IT expertise and knowledge as well as analytics tools which might not be available for all companies (Järvinen & Taiminen, 2016). To avoid a situation where these become an issue, companies might want to look for external expertise/resources. According to Ascend2 (as mentioned by Murphy, 2018), up to 63% of companies implementing a MA software outsource a part or even all parts of their MA planning and running. Moreover, three out of four of the highly successful MA users have outsourced everything related to MA.

To summarize the final, seventh antecedent, with MA implementation there is always a need for staff and having the correct human resources available. Sometimes it might be enough to train existing staff and provide them with incentives to do so while sometimes it is worthwhile to outsource at least a part of the process. Nowadays, it seems likely, that outsourcing becomes even more popular as it requires merely monetary investments as well as some internal staff members to fully utilize the MA applications. Still, as mentioned before as well, all of this is dependent on the scope of the overall MA project, the size of the company and the field in which it operates in to name a few things, leading in the importance of a well-planned implementation project.

3 METHODOLOGY

This thesis is conducted as a case study, where the main empirical data is collected during a three-month period (01.03.2022 – 20.5.2022). The research was done using qualitative research approach, with interviews being one-to-one, in-depth, and semi-structured. Two employees from different departments of the case company were interviewed. The selected interviewees worked full-time within positions related to sales and marketing and were the only two employees available from the company that took part in the implementation phase.

The author of this study had a significant role in the implementation of the Salesforce Pardot MA software within the case company. This previous work therefore influences the study through, for example, observation possibilities. Furthermore, this study is conducted using a case study research method which follows qualitative research methodologies. Finally, as this study mainly uses a single data collection technique, in this case semi-structured interviews, the study can be said to be a mono method qualitative study (Saunders, Lewis & Thornhill 2019, 179).

3.1 Case company description

In this thesis, the case company description will be limited to public knowledge and some personal knowledge from the author as the case company and their employees want to remain completely anonymous. The case company is a Finnish B2B company who manufacture, design and provide logistical solutions. Today, the company operates globally and follows such global megatrends as e-commerce, digitalization, automation and integration possibilities.

As of today, the case company employs more than 400 personnel within different positions. The company's headquarters are in Finland, but as mentioned, the operations are run on a global level. Even though the company has over 400 personnel working for them, they are continually investing and changing to increase their market shares within the logistics industry. These changes include sales model changes as well as changes to marketing, with the new MA platform implementation.

The company had a working MA platform, Eloqua, in place already before they started looking for other solutions. The company adopted their new MA platform, Pardot, in late 2020 and started the implementation process during 2021. The author of thesis was working in the case company during this implementation period, beginning in 2021. The author worked withing marketing, communications and sales support, with a lot of their work focusing on implementing the new MA platform and making sure everything is carried over from the old system.

Pardot, the platform the case company acquired in 2020, is a B2B suite of MA tools to create easier, more straightforward connections with customers and thus increase sales numbers (Salesforce, 2022). As a company, Salesforce also provides a plethora of other inbound marketing tools such as CRM, SEO, landing pages and analytics. The case company already had the CRM tool “Salesforce” in place before the start of the implementation process. The MA software, Pardot, has four plans to choose from: Growth ($1,250/month), Plus ($2,500/month), Advanced ($4,000/month) and Premium ($15,000/month). On top of these, there are multiple different add-ons available for the platform, which are also billed on a monthly basis. All the packages include 10,000 contacts, except for Premium with 75,000, with pricing for exceeding the limits. All the packages are sold as packed software, so they require minimal editing to meet the company’s preferences. (Rowe, 2022.)

3.2 Research approach and strategy

As this study is highly theory driven and will utilize the framework by Murphy (2018) to figure out the correct antecedents for a MA implementation, the study can be said to have an abductive research approach. In abductive research, there is a need to identify a theoretical position, which is modified and tested through additional data collection (Saunders et al., 2019, 153). In this study, the theory is tested by conducting interviews with the case company representatives as well as by observing the implementation process firsthand through working within the company during the process.

Case study is a research strategy that aims at studying a topic or a phenomenon through in-depth methods. In case studies, the researcher can study one case or multiple cases, including individual persons, organizations, groups, events or many other similar “cases”. (Saunders et al., 2019, 196-197.) Yin (2003, 5-8), mentioned that some questions a case study approach is perfect for answering include “why” and “how” questions. Moreover, both Saunders et al. (2019, 196) and Yin (2003, 5-9) highlight the fact that case studies are appropriate when the research wants to study a real-life phenomenon such as an organizational process. Thus, as the main research question in this research is “How is MA implemented in a B2B company?”, the focus is on the case, the company, and the adoption and implementation process of a new MA software within that case. This is the reasoning behind choosing case study as the main research strategy. Below in Figure 4 is a representation of the research approach, research methodology and sources of data used in this study.

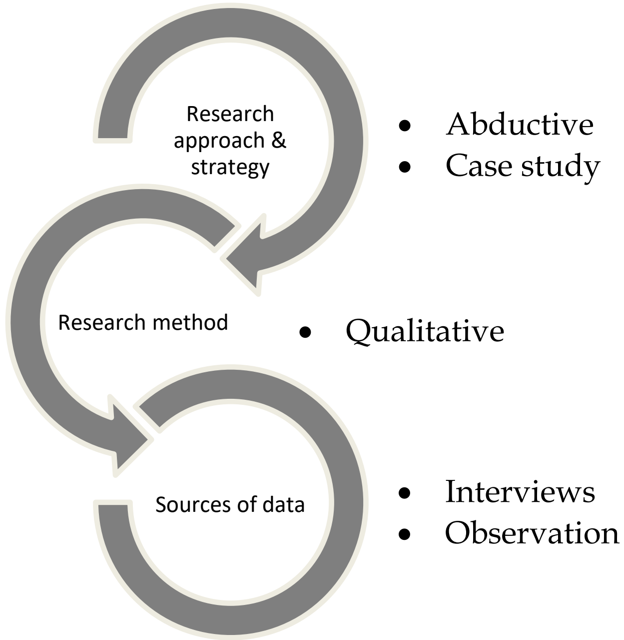

FIGURE 4 Research approach, methodology and data collection

3.3 Semi-structured interview and observation methods

In qualitative research, the studies usually focus on understanding the meanings and their relationships. This is done by utilizing various data collection methods and in the end the results are analysed to develop a theoretical contribution. The data that is collected is usually not quantitative, but sometimes even quantitative methods can be used. It is possible to utilize numeric, photographic or even observational data. (Saunders et al., 2019, 179.) In this research the empirical data is gathered through observatory methods as well as conducting interviews with the case company's employees.

According to Saldana (2011, 32), most qualitative research studies utilize interviews as the main data collection method. Interviews are good for gathering individual or group perspectives, feelings, attitudes and even beliefs about the subject at hand. They also help in, for example, gathering information the researcher could not gather via observing. Moreover, by carefully listening to the interviewees, the researcher is often able to confirm and clarify meanings and reasons for actions. (Saunders et al., 2019, 434-435.) As mentioned by Saunders et al. (2019, 437-439), there are many ways to structure an interview. They can be highly structured with premade questions that are asked similarly from all interviewees, they can be semi-structured with less restrictions in the questions or they can be completely unstructured and informal.

In this research, the interviews were held using a semi-structured interview method, meaning that all the questions asked were asked in the same order and were planned before the interviews. By using the semi-structured method, the researcher got the possibility to ask any related additional questions during the interviews. All the questions were formed based on the theory presented in chapter 2.4 by Murphy, as well as from the observations made during the time the author was working at the case company. In total, there were two (2) interviews in May 2022. At the time of the research, there were only two people working with the MA platform in the case company. These two persons were the only ones who knew how the MA platform functioned and how it had been used in the case company.

As the sample size in this study was small and the study was conducted as a case study, the sampling method chosen was purposive sampling. In purposive sampling, only the cases or persons who provide the most value towards answering the research questions are chosen (Saunders et al., 2019, 321). In this study, the persons with the most information towards MA and its implementations process were the Sales Director (SD) and the Marketing Manager (MM) of the case company.

Marketing Manager

- Responsible for all marketing related activities
- Project champion in the implementation process
- Interview 16.5.2022
  - Length: 35 minutes

Sales Director

- Responsible for B2B sales
- Was reported to by marketing team in the beginning of the implementation process
- Key role in the CRM/SFA environment
- Interview 17.5.2022
  - Length: 30 minutes

TABLE 1 Interviews in the case company

Both interviews were conducted one-to-one via the online platform Microsoft Teams. The online platform was chosen to limit traveling between the parties and because it was seen overall as the easier option by all participants. Interview with the MM lasted for 35 minutes and the interview with the SD lasted for 30 minutes. These details can be found from Table 1 above. All the responses were recorded both by the software as well as by hand during the interviews. These responses were then finally worked on, transcribed and analyzed after the second interview was held.

Along with the interviews, the researcher carried out observations during 2021. In qualitative research, observation is a commonly used method, and it is used to gather information that can be perceived in one way or another. According to Saunders et al., (2019, 378-383) observations can be done in a participative way, in a non-participative way, as structure observation and even via internet. Regardless of the method used, the observations should always be recorded to make analyzing them later possible.

The observation data for this study was collected when the author was working in the case company, throughout the year 2021. Thus, in this case the form of participative observation was the most suitable. Most of the observational data was about how different departments saw MA platforms, how it affected sales activities and lead qualification and how the new system could be utilized in marketing activities, including figures like website and social media traffic and engagements. The author gathered this data by participating in meetings on MA, making plans for the system and making notes throughout the whole implementation process. Additionally, as the study is conducted as a case study, the author spent some time going through, for example, the annual reports and business reports of the case company. The final analysis of this thesis is based on the interviews, observations and the exploration of business material.

4 RESEARCH FINDINGS

The research findings of the research are categorized in the same way as the antecedent framework by Muprhy (2018) presented in Chapter 2.4. In the case company, the MA implementation took place from 2020 to 2021 and is now in May 2022 starting to move into daily usage phase. The three stages that the findings are categorized to are pre-implementation, post-implementation and one that spans all. Pre-implementation includes findings about business changes, scoping, management buy-in and project champions. Post-implementation incudes topics of content marketing and content, investments and goals and goal expectations. Finally, the last stage that spans all stages includes findings about human resources and their usage. It should be mentioned that the last stage can and should be somehow visible in all stages due to its nature and the framework by Murphy.

4.1 Pre-implementation

Before discussing about the different pre-implementation factors and how they were visible in the case company, it is crucial to mention the situation the case company was in before the implementation process itself. The case company already had a functional MA platform in place called Eloqua, but it was not properly used during the time. There were email campaigns, website functions and landing pages in place, but the company saw there was more room for improvement especially in the marketing side of the business.

4.1.1 Business and strategy changes

As the case company already had a MA software in place, the business and strategy changes could be considered less impactful than in situations where MA is implemented the first time. Still, the case company saw some changes during their implementation process.

The main changes brought out during the interviews were towards organizational structures and branding. For example, the MM of the company highlighted the changes within the company's sales function and their structure.

> *"Before, we had specific teams responsible for different types of accounts and there was a partner team, for example, which was responsible for the partner companies and cases. Now we have changed the structure and the whole organizational chart in a way that now it has industry specific focus. So basically, we have industry specific teams responsible for the accounts and the key accounts within their specific industries."* **MM**

This not only affected the lead generation process but also the lead handling process, one of the usual strong points of implementing a MA platform. Basically, the company moved between two different sales funnels: the old one where the leads belonged to a group of predefined people (partner team, direct sales team) and the new one where the leads belong to an industry team. This also makes the whole lead process more straightforward and controllable than before.

> *"Of course, the lead handling is now more straightforward, more process like. Also, it has to do with the tool, and it has to do with the resourcing. So now one of the colleagues is basically qualifying and assigning the leads several times a week. So, the assignment, when it is done within the same set of tools, Pardot and Salesforce being integrated, the assigning is easier and more straightforward."* **SD**

Another business change mentioned was about branding and the vision of the company and its offering. Before the implementation process began, the company was planning a move from a product focus to overall logistical solution focus.

> *"- and then another change of course was the brand change. So basically, the transition from this product focus to the overall solution focus, which has affected also not only how the system looks but also how the system feels, and what kind of prospects we have within the systems."* **MM**

Of course, such big changes like the branding change in the case company are never only due to a software implementation project and should not be considered such even in this case. Still, it is clear that when discussing such larger changes of the company structure, the case company saw it as a good timing to implement a better MA software as well. This can, though, make the implementation process more difficult as the focus can easily be on something else within the company that is seen more important than a new MA software.

Regardless of the big organizational changes, having a new MA application implemented during this time was seen as beneficial:

> *"I think it opened a lot of possibilities for us. We now have even larger groups of people that we want to target and even more specific groups of people that we want to attract. So, in a way that kind of [change] to targeting and lead qualification and clarification helped us to even personalize our approach better."* **MM**

> *"And then of course, it [marketing automation] changed the thing that it is easier to see more data about the customer already from the lead form than was available before. Then, when evaluating that where is this person from and how did he find us and so forth, - - I think that in the past marketing had to dig out this information from other sources and now it is there without any extra work."* **SD**

By combining the business changes of launching a new brand with different targets and audience and organizational changes the case company received a crucial starting point, a steppingstone so to say, to build their new MA platform on. Without these changes, the implementation of a new MA software could have been in vain, as the system would have most likely been used in highly similar manner as the previous system Eloqua was used.

4.1.2 Project scoping

When it comes to project scoping, the interviews gave somewhat contradictory results. On the other hand, both the MM and the SD agreed that having proper scoping was mandatory to have a successful project but based on the interviews there were different levels of satisfaction on the level of scoping done.

When it comes to the amount of scoping needed for the project, the MM would have preferred more detailed scoping than was done but the SD saw the scoping to be sufficient.

> *"Well, it [the project] was quite well scoped based on the assumptions and understanding what we had beforehand and because there were quite detailed descriptions by the MM. - - And well, in my mind the scoping was good enough. It could be, of course, always more detailed, but from my point of view it was well enough this way."* **SD**

> *"The scope is never the same as what you assume in the beginning and in this case the scope that we initially had on mind was really kind of an underestimate of what that [the project] would take. The fact that we did not start from the scratch and actually already had a system in place is the reason behind this. So that made a huge impact on things."* **MM**

As mentioned by the MM, the case company ended up underestimating the scope of the project since they did have a functional MA application in place that they would replace with the new system. It is interesting to note that even though the SD was a major part in the actual implementation project, they did not see the scoping to have been underestimated, at least by a considerable amount.

Later in the interviews there was a question regarding a project champion which revealed the project champion to have been the MM in this case. This might explain the differences in the views, as the MM most likely had way more touch points to the project during the implementation and buy-in phase than the SD did. The role of project champions will be discussed further in the next chapter.

When it comes to scoping the costs, both the MM and the SD saw room for improvement, but once again the MM saw the scoping being more off the mark. Both validated that the costs for the basic project were mostly on point, but some development projects later in the timeline were not considered before starting the implementation.

> *"The scope ended up being something completely different from what we have assumed, both schedule wise, budget wise and task wise. This is because there are still a few parts and things in the development road map that we are in need of even though the [implementation] project has ended."* **MM**

> *"And then the cost. Well, there were extra costs regarding the problem solving in the end, but the basic project went according to the budget, as I recall."* **SD**

Even though the case company's personnel had contradictory views on the scoping of the project, the overall consensus was that proper scoping is crucial for any type of project to be run. The scoping done before the implementation began was considered a backbone for the project and its intended operation.

> *"It [scoping] was critical in the sense that it got the project approved in the first place. And of course, from that moment on it was the guideline, the target where we needed to aim, so I would use the word backbone to describe it [the scoping]."* **SD**

The MM even highlighted that in possible future projects, the company should pay more attention to high quality scoping. This would not only ease the process going through to the finish line but also in convincing others of the importance of the project and the goals the company aims to achieve by completing it.

"I would say that, specifically for our situation, if I could change something [in our scoping], I would probably find a partner who is very familiar with our previous system and knows all the kind of the tweaks and things that need to be taken into account. If we have to do this [again], then I would really make sure that we understand the current system in every single detail to make sure that we understand everything that needs to be moved and how it's going to work." **MM**

Observations made by the author during his time in the case company can confirm everything mentioned by both interviewees. Even during 2021, there were a lot of development to be made within the implemented MA software and multiple development items that were under discussion. Regardless, the case company was happy with how the project had been organized and, even though the initial cost estimation were somewhat misleading, executed.

4.1.3 Management buy-in and project champions

The management structure in the case company is rather straightforward, with top-level management being reported to by all employees. During the implementation of Pardot, the current MA software, the SD was reported to by marketing and the current MM, who was the only one in the marketing team at the time. This changed during the implementation process as mentioned before, and currently the Vice President of the company is the manager both of the interviewees report to on a daily basis.

For the managerial buy-in, the case company saw the implementation process to have been fairly normal. The managers did indeed need some convincing pre-project, with especially marketing needing to convince them about why the platform change is needed and how it can be used in other departments, like sales, as well. Overall, getting the management was rather easy and did not require vast amounts of effort, which is invaluable for a software implementation process such as the case company's one.

> *"It did take a lot of kind of explanation, convincing, why we need this because it [marketing automation] simply had not been used outside of marketing. It was mostly used as an email sending tool but not really as a tool to help finalize or to understand the data, to personalize their approach or even qualify the leads. But once they realized the potential, I would say that they were on board."* **MM**

The SD did mention a lot of the same things as the MM, but also pointed out information from the managerial point of view:

> *"The role of a management in the company is to challenge the ideas, especially the development ideas. So of course, some convincing is needed. But it was quite easy to reason with figures, with numbers that the cost will be this, but the payback will be quite short based on savings on the Oracle Database license cost and things like that. So, I think it was normal or quite easy to get the management on board."* **SD**

This type of understanding of managers and their role is especially important when implementing something that needs a lot of convincing to be done. Within the case company, the hierarchical system can be considered flatter than in most companies, with a lot of work being done between traditional hierarchical levels. For example, it was not uncommon for top management to spend most of their days working side by side with assistants and specialists within different departments. This combined with the understanding that scoping was rather successful are probably some of the reasons managerial buy-in was seen as straightforward and easy.

Project champions are also a subject that is not misunderstood within the case company. During his time in the case company, the author of this thesis recognized that the case company always wanted to have a project champion of sorts in all projects. For example, when discussing about events and event marketing (including using MA), the author of the thesis was chosen as the project champion to run meetings, keep everyone up to date and make small-level decisions. The value of having a project champion was brought out by both the MM and SD during the interviews.

> *"Yes, there is definitely a huge advantage of having one person facilitating the whole process. Especially internally, because there are many, many processes and many opinions from many different people. Someone has to take on this role of aligning our opinions, the process and making sure that whatever we decide on is one single decision, not just [a mix of] contradicting opinions and ways of working."* **MM**

> *"There always needs to be an owner. Otherwise, if there is no ownership, nothing will get done. So, it is clear that there needs to be a dedicated project manager for such exercises, no question."* **SD**

In the implementation process of the case company, the MM was chosen to be the project champion. As mentioned by the MM, this role was not taken completely willingly but because she was the only one working within marketing in the case company when the project started. Having a larger project like this on one's shoulders could be demanding on a person if it is added on top of everything else the person is already working on. This could affect the quality of the whole project considering the impact a project champion can have on it.

The case company has since implementation started looking for a person to work on the project and the development items still on board. This person would act as a project champion for MA related issues in the future and would take charge of any additions or changes made later.

> *"I am happy to see the development in this because at the moment we are very actively recruiting and searching for a person who will work as a project champion in the future, as well as to make sure that the process is not just complete and that's it. It is actually developing further and it's an ongoing process."* **MM**

Overall, the ability to have a project champion not only pre-implementation but also post-implementation is a huge benefit as mentioned. This combined with straightforward managerial support is great for the case company and their future implementation projects.

4.2 Post-implementation

Post-implementation analysis includes information on how the MA implementation was seen performing, what types of investments and what type of content changes have been recognized after the implementation process itself. At this stage, the implementation should be complete and the information that follows should come from the normal usage of the system within the company. It was great to see, as mentioned in the last quote by the MM, that the case company recognizes the need for post-implementation improvements and efforts. It is, of course, still to be evaluated whether these efforts are carried out in a worthwhile way or not but having the openness for changes in the background certainly goes a long way.

4.2.1 Content marketing and content creation

Because the case company already had a pre-existing MA software in place before starting the implementation of a new one, there obviously was premade content available to use. Using this previous content can be seen as both positive and negative in terms of content marketing. On the one hand, having previous content can be helpful if it can be integrated well with the new system, saving the time, efforts and money creating the content would otherwise require. On the other hand, having this content can easily have a misleading effect by causing a sense that creating new content is therefore unnecessary. The latter is not only harmful from marketing perspective but will most likely halt any progressive efforts as well.

At least during 2021, the case company was continuously creating new content and showed willingness to do so regardless of the previous content available. The content creation was still on a fairly small level and was only done when it did not interfere with more urgent matters at hand, such as the brand change and event participation. The same content methodology has carried over to current time of Spring 2022, so the implementation of the new software did not change content schedules, at least straight after the implementation had ended.

> *"I do not think the [content] amount has really changed. Or at least the new system has not affected it."* **MM**

> *"Probably it [the amount of content] increased slightly. We would like to increase it [more], but that is a new resource question. So, yeah, I think that remained basically on the same level."* **SD**

Regardless of the amount of content remaining the same, the interviews still shed more light on the willingness and efforts on future content creation. Both the MM and SD emphasized that they are currently looking for and recruiting new marketing talent to run the MA software as well as to create new content with it. It was also mentioned that having a new application in place could help someone capable with the system in bringing out its benefits more than has been possible previously.

> *"Our marketing has been developed all the time and now we are also increasing the resources. So, are they [new personnel and marketing automation implementation] tied up? Well probably there is a connection because the new marketing person, I think there now is more insight for them on how to create the posts so that they would work better and create interest generated leads."* **SD**

The MM also shared the view on the importance of connection between new marketing personnel and a new, more familiar MA software. At the same time, they shared some insights on how they plan to utilize data in a more influential way to improve content sharing in the future. This latter development item is still on an idea level and the implementation will follow later, when there is time for it.

> *"Maybe once we actually get a chance to find this project champion, I see a lot of possibilities in terms of how to build this link between the two. Once we*

> *actually get into this, I see that there are a lot of possibilities to improve the content based on the data that we receive through the marketing automation. We are not actively doing that as of now, but we are planning on it for sure."* **MM**

By combining the two ideas of hiring new personnel and implementing the new MA software the amount of data gathered is certain to increase at one point or another. Thus, even though the new content creation has not started even the implementation project has ended, the barrier to do so is lower. The increased user-friendliness, better capabilities, tracking abilities and sharing possibilities that introducing a new system brings to the case company are the key reasons that allow this.

4.2.2 Goals and expectations

One crucial aspect of a successfully perceived project is to be able to meet the goals set in the beginning of the project, usually during scoping phase. This not only increases the probability of any possible future development ideas going through, but also motivates the users of the software in ways that lead to better results and user experience.

During the scoping of the implementation project, the case company had set clear goals, as mentioned before in this thesis. The goals set were mostly formed by the MM and were more about the technical side and about having a system that integrates with the company's CRM system in place. According to the interviews, the consensus is that the technical, basic goals were met as expected, but there is still a lot of room for improvement. This means that some goals set in the beginning, like the schedule for complete implementation, were not fully met, but on a positive note, this has not halted the process of developing the system further.

> *"I think the main priority to have everything under the same system has been achieved and now it is about the development. There still are a lot of ways on how to improve the system, but I think that the basic and essentials are there."* **MM**

Like the MM, the SD also saw the basic implementation to have been successful and have met the goals set in the beginning. Surprisingly, they were not too familiar with the current development ideas and leaned heavily towards the company's MM regarding the topic. It would be more useful for the company to keep everyone involved in the process in the loop better to avoid confusion and hassle these future development ideas might cause. It is, after all, highly unlikely that the marketing department makes all the future decisions by themselves, with the sales team strongly influencing the usage of the system as they should.

> *"I think in general, the basic implementation, I would consider successful. There are further development needs, many of them which nowadays the MM is much more aware of than I am myself. I think those need to be made, but it is a case that the basic platform is now there and then it is up to us to really get [the*

system] up to speed, to be able to implement all the features, and bring out all the benefits we can." **SD**

One way the case company could ease the future implementations is to, in the scoping phase or even after the main implementation, set up smaller follow-up goals to reach. By reaching these smaller goals, the company could increase their motivation towards any project and see constant progress being made. As said by the SD, it is in the end up to them to bring out the benefits of the new system the best they can and reaching goals could be the key to success.

The manner of utilizing could also help in portraying a feeling of continual success. In the case company, the result achieving was considered slower than was initially expected. Again, the technical implementation was considered to have been finished on pace, but the overall results lacked behind the original schedule.

"I think if you consider the results from the technical features perspective, they showed up immediately. How and when you implement them [marketing automation tools] in the actual process is something that is going to take some time because it is about the way of working. That does not change overnight. So, it does take some time to learn how to take advantage of and most importantly why you need the new system. This is still something that we are going through and still something that we are adjusting to." **MM**

"[The results] were slower I would say, yes. They took a bit longer than was expected. I think this is typical for this kind of process that you have some glitches." **SD**

Regardless of some results showing up slower than expected and having a few development ideas still worked on during the time of writing this thesis, there was a positive tone in the interviews when talking about results. For example, when asked about the original goals and their realism, both interviews shared the view that the goals that were set were indeed realistic. By having realistic goals and expectations the overall scope of the project does not get too ambitious. Also, by giving them enough time to work on the project and by investing in personnel and training for the platform, the case company has made itself room to develop even the rest of the company towards a more innovative project management style.

4.2.3 Investments

Due to the NDA, the questions regarding investments focused more on the future plans and on hiring external help for the new MA platform. The author of the thesis wanted to keep larger investments out of the questions due to them possibly revealing the case company's identity.

When it comes to investments, their amount, scope and direction is always dependent on the company, its operations, maturity and the project at hand. This was also mentioned in the interviews by the MM, showing good understanding of business sense within the case company.

For the case company, the most obvious investment was considered to be personnel. Even though in many cases a MA platform might even lead in layoffs within the marketing team, the situation of the case company and its marketing team sort of forced the investments to focus on hiring additional talent. Neither the MM nor the SD saw any other major investments related to the MA implementation project. Again, this might be due to the NDA between the company and the author.

> *"There was a number [of investments made], but I do not really think that they were in any way related to the topic of marketing automation. Maybe one thing that I could highlight is that it strengthened the need for the project champion and for the person who will be the owner of marketing automation. So, resource wise, yes."* **MM**

An interesting note was that even though the SD knew about the investments in personnel for the new MA software, they did not consider the investment to be a part of the original project. They saw it more as a general development investment that helps the development of the new system. This contradictory view is similar to the one regarding scoping of the project. When asked if they knew of any investments for the MA implementation, the SD said:

> *"Related to this project, I would say no, even though there were some additional purchases made for problem solving [within the software]. - -There are resources we are adding, but that is not related to the project in my mind. I do not see that maybe as a part of the original approach, it's more like developing the platform to the direction we want to, and that of course requires a resource. And this resource, digital marketing specialist, will be now added to the team during summertime."* **SD**

Even though the views on why the new personnel investments are needed were different among the employees, the company still considers future investments crucial for any type of project. As mentioned, it really depends on the company and its project goals on what to invest in, but a clear need for project champion in any situation was brought up in the interviews.

> *"I think it really depends on the company, on the team and their ways of working. But I would say that as with any project, yes, it is crucial to have a project owner or project manager who takes care of the project and makes sure that it is developed further."* **MM**

Additionally, especially the MM highlighted that the process is still ongoing even after the actual implementation and that development of the system is a major task in the future. The case company needs to thus follow up on all updates on the software and marketing field overall and adjust their processes as these updates occur.

With the idea of the process being continuous and not ending when the software has been implemented, the SD also mentioned that this was one of the key learnings for them from the project. Even though the MA software is mostly for automizing marketing activities such as email management and running website content, there always needs to be a person or a team behind all of it to have it run as efficiently as possible.

> *"The system is automatic, yes, but there are processes you need to develop and define and there needs to be an owner for that. - - This is definitely something to highlight to get the full benefit out of it [marketing automation]."* **SD**

4.3 Antecedent spanning all stages

The final antecedent that in the original framework spanned all the stages from pre-implementation to post-implementation was about having the correct human resources throughout the project. This included hiring new staff members, outsourcing a part or even all of MA and training staff to be able to run the new system to its full potential.

4.3.1 Human resources

As can be seen from the discussion previously in this thesis, the topic of correct human resources did indeed come up in practically all parts of the interviews. Whether the discussion was about investments, project scoping or project champions, there were multiple comments about hiring new staff for the new MA software.

The need for new staff was based on differing views and opinions as mentioned in chapter 4.2.3 about investments, but the case company nevertheless decided that such investments is needed. Both the MM and SD highlighted how limited the current marketing team was and how it limited the overall operations from lead handling to final sales. They also saw that even though the new system is considered automatic and can in some cases be seen as a replacive tool, the current situation gave no other option than to proceed with the hiring process.

As mentioned in the literature review, most companies implementing a new MA software outsource at least some of the project to some other company. Often these companies specialised in MA get the best possible outcome for companies investing their money in them. The same situation was present in the case company as well, as they mentioned in the interviews. This was also noted by the author, as he worked with the outsourced system provider on a daily basis while working in the case company.

> *"Basically, the whole process from project implementation has been outsourced by us to our marketing automation system provider. This includes the development road map as well, or at least the items from there."* **MM**

> *"It was mostly outsourced in the sense that the project manager from our side was our marketing person, but then the implementation work was included in the scope of supply of the supplier. So not too much hands on work from our side."* **SD**

Based on the answers in the interviews and on personal observations, this decision to outsource the process was great for the case company. Not only it gave the MM time to work on other urgent matters but also enabled a plethora of possibilities that would not have been available without the outsourced system provider. Of course, a great indicator of a well-run process is that the case company has remained with the same supplier from the beginning, leading in better capabilities for discussion and future development.

The final question was about training for the platform. As mentioned, if the process was completely outsourced, the training for the platform can remain quite limited to only those responsible for the system and its usage. Regardless, the case company sees possibilities for future training within their different departments. This emphasizes the flat hierarchy of the company and the fact that all departments do indeed work together, not leaving marketing on their own with the marketing and MA. At least the SD saw some value in training the sales team to utilize the data from MA better, but only after the whole development road map has been finished and marketing is happy with the system.

> *"Of course, it is currently quite easy to look at the information in Salesforce [the CRM system]. My understanding is that there are a couple of development ideas which we want to implement first and then it would be time to also educate the sales on it [the system]. But in the future, it definitely would be useful to have some sort of [training]."* **SD**

The case company's MM shared similar views that once the technical side is finished and the development road map has reached its end goal, it would be beneficial to train other departments of the possibilities the new system brings with it. This would especially help in customizing the offering based on the information MA provides. The MM would also have wanted more training for themself about the new application, but due to time limitations mentioned, they moved on with more of a hands-on experience. Having time and a peaceful setting would have helped the MM to use the system in a better way, leading in faster implementation process and more efficient usage later. It is a shame, that due to resource and time limitations this could not happen, but outsourcing can be considered the redeeming feature even in the case company's situation.

> *"Honestly speaking, I did not really have the time to learn how to use it [the new application] and it was just a really hands on experience. I would actually really have appreciated this time to just learn in peace and take my time with the system, just to introduce myself to it and check how it works and what are the tweaks and twists."* **MM**

Considering and discussing about the human resources within the case company thus played a key factor in the overall implementation process. Of course, as can be seen from the answers, there always is room for development and the company could have spent more time with, for example, training the key personnel for the platform. Still, it is valuable to the case company that they keep developing the system and investing in future project champions. Something like a new MA software can be considered a never-ending process, and it is great to see that the case company recognizes that fact as well.

4.4 Summary of research findings

This study aimed to increase the understanding of a successful MA adoption and implementation in B2B companies. This attempt was backed by studying aspects of MA implementation, such as what are the antecedents of MA implementation and what benefits and drawbacks are recognizable when implementing a MA software.

The antecedents of MA implementation in the case company are presented in Figure 5 below. The figure is a modified version of the framework created by Murphy (2018). Based on the research findings, the figure contains the same phases of implementation and the same seven antecedents mentioned in the original study. There are two antecedents (scoping, goals) overlapping with the are of the antecedent spanning all stages, human resources. This overlapping represents their value for all phases in the project, but also emphasizes the main phase they are important in.

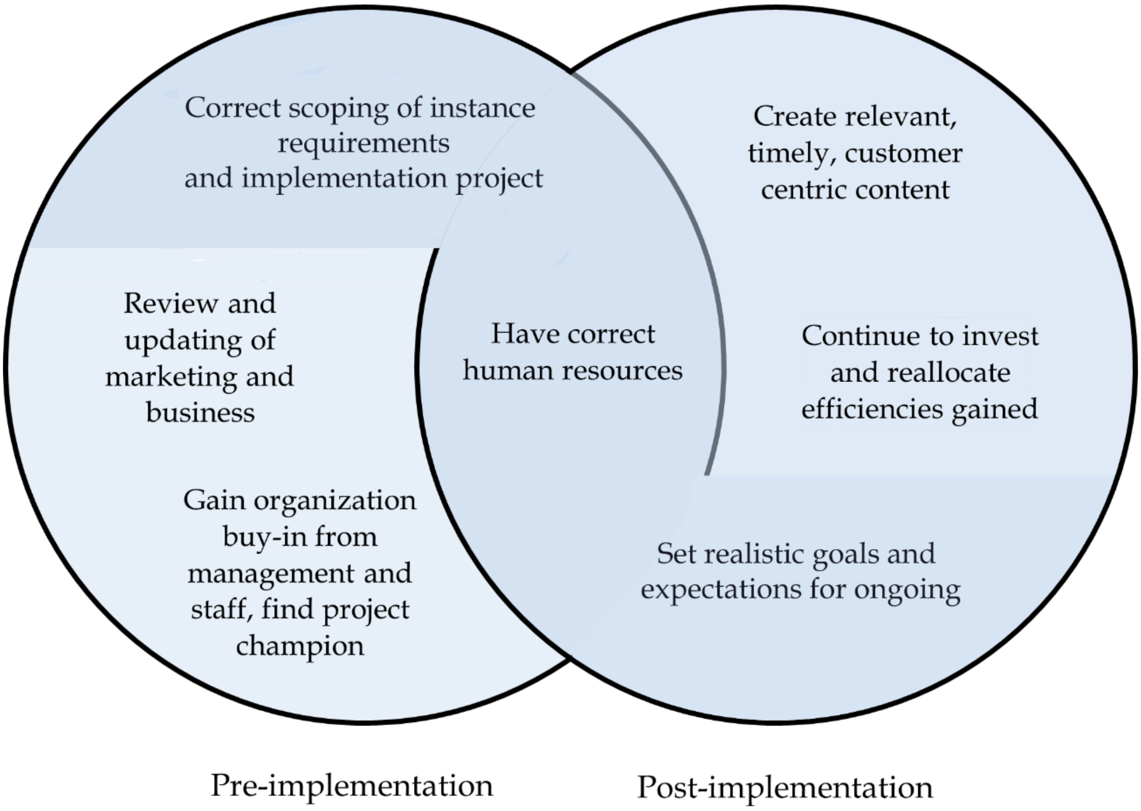

FIGURE 5 Antecedents of marketing automation implementation in the case company

In the pre-implementation phase, the main problem spot for the case company was scoping the project and the requirements for it. As mentioned by the MM, the scoping should have been focused more on, not only before the implementation but also later in the process. Therefore, the antecedent of having correct scoping of requirements and the actual implementation has been extended to the antecedents scoping all parts of the project in the Figure 5 above. As scoping is still considered to be more of a pre-implementation issue, both in the case company and the original framework, it remains on the left side of the figure and not completely in the middle like the human resources do.

The scoping issues were, though, somewhat due to business changes within the case company. The case company should have considered implementing the new MA software after the major business changes, like the branding change, were made. This would have eased the scoping process and would have given more emphasis for the implementation process itself. Implementing a disruptive technology such as a MA software is a major task that requires a lot of effort and time to be proper.

When it comes to organizational buy-in and project champion, there were some contradictory findings made. For example, based on the observations and interviews, the company did highly value project management and having a person or a team running a project, but this particular project of implementing a new MA software did not receive one voluntarily. In the end, the project had a champion in the form of the MM, but this was due to personnel limitations. Moreover, the company is continuing the development of the project by investing in a marketing person who is going to be the main operator of this software and other similar systems in the future. By having this person, implementing other additional systems, like a new SFA system, should become more easily manageable. Even without having a project champion per se, the scoping and business changes enabled the project to be approved by the case company management. This is always mandatory for a project to go through.

The same explanation that was made about scoping in the pre-implementation phase can be applied to the post-implementation antecedent of setting realistic goals and expectations. The antecedent itself mentions goals and expectations made after the implementation, but after reviewing the results, this antecedent should consider the whole process, at least in the case company's situation. The case company did set goals and expectations in all stages of the project and based on the interviews, is today even more goal-driven than in the beginning. As mentioned previously, the case company could have set smaller, mid-level goals during the project to help in achieving the feeling of accomplishment more often. Still, the overall feeling was received that the expectations and goals were mostly met.

One antecedent the case company did not really focus on when implementing the new application was creating fresh content for their customers. This was a small surprise for the author of this thesis as in the company, the relevancy, timeliness and customer centricity of all content published is noted in everything they do. This lack of focus on content might have been due to the case company considering the process as more of a change from an old software to a new one rather than as an implementation of something new. The case company should now thus focus more on the content creation in the future, perhaps once the new system owner starts their work during summer 2022.

Finally, the ability to continue investments and reallocation of efficiencies was noted to be happening in the case company. As said, the company is continuously developing the software further with the help of their system provider and are introducing new, in-house help to gain most out of the new system. This is an important step, but only visible during the post-implementation phase within this case, and thus it has not penetrated into the other phases or antecedents.

4.4.1 Results of the implementation

One supportive research question was to find out any benefits or drawbacks of implementing a new MA software. The general idea in the case company was that the implementation process was a success. The business changes and lack of personnel had a notable impact on the perceived success, but the outcome was still considered positive.

> *"I would say [the implementation process went] mostly according to the plan and on schedule thus far. In the end, there were some issues which needed to be sorted out, and they took quite a long time to get sorted out, but they did."* **SD**

In the beginning, the company underestimated their capabilities. The amount of work and time the implementation took came as sort of a surprise to the staff, but the shortcoming was used as a learning block for future implementations and development items. Positively, the company never considered MA as a tool that would magically increase sales numbers or boost marketing activities on its own. This thought leadership was present in all phases of the project and all departments are still considered mandatory for business to continue as planned, even after the new system was introduced.

One major benefit the new software brought was the integrity of systems that the case company used. Now, both the CRM system and the MA software are under the same build made by Salesforce. This has changed how leads are qualified, how the combined marketing and sales funnel operates and how everything is monitored. The current lead database is much cleaner than previously, and sales has a better understanding of their customers' needs as MA automatically uploads data to the lead information panels.

Even though marketing was considered a crucial part of the company before the implementation process, the new, more versatile operation system helped in bringing out the value of marketing to other departments. This trust can be seen, for example, in the investments made towards marketing and in weekly meetings, where the marketing team now gets even more foothold than was previously available. Of course, these benefits are a sum of other aspects as well, but there is no denying MA helped in all of them on some level.

5 DISCUSSION

The discussion chapter contains discussion of the findings through more specific categories. First, the three theoretical contributions made in this research are presented and compared to previous research and their findings. Second, the findings are discussed from a managerial perspective, which includes a guideline for MA implementation in B2B companies. The guideline is separated to three different phases: guides for pre-implementation, post-implementation and guides that are applicable for all phases. After the managerial implications, this study is evaluated, and any limitations thought of are mentioned. Finally, the author makes his suggestions for future research regarding MA and ICT implementation.

The main goal of this study was to find out how MA is implemented in a B2B setting and what are the factors that lead to a successful implementation. Interviews with employees of the case company and observations made during authors work period in the case company aided in achieving this goal. This goal can also be considered the managerial purpose of this study. After the collected data was analyzed and multiple antecedents for MA implementation recognized, a guideline for MA implementation in B2B companies was created based on the results of the case study.

5.1 Theoretical contributions

For theoretical contributions, there are three made in this study. The theoretical contributions are mainly made based on the frameworks and theories proposed by Murphy (2018), Heimbach et al. (2015) and Järvinen & Taiminen (2016). First, the study suggests that having timely, relevant and interesting content is a key to all MA implementations. By having satisfactory amounts of content available, the use of MA becomes more feasible. This study does not confirm whether the content is essential for other systems, like CRM or SFA, or not, but recognizes that there are possibilities for integration between the systems. Furthermore, the overall successfulness of all implementation processes is usually more dependent on the users of the system as well as the organization behind the users than the system itself.

Still regarding content and content marketing, as mentioned by Järvinen and Taiminen (2016), producing the content and having correct content marketing strategies in place takes a lot of time and effort from companies. This approach of patience within an implementation is not only crucial for content or MA implementation, but also for other similar efforts like developing a new software feature (Brinker & Heller, 2015). Of course, having content available makes it easier for a MA software to be implemented, but the timeline should always have some space for glitches in the process. Before implementing a MA software, the company should thus figure out what they are offering, what their leads want to know about them and build relevant content based on that information.

As mentioned in the study by Benz & Tanner (2017), many implementation projects miss the scoping phase either completely or partially. When scoping is done properly, the overall chances of successful implementation increase with positive effects in other parts of the company as well (Gunasekaran et al., 2001; Murphy, 2018). As the second theoretical contribution of this study, the study emphasizes the need for a thorough scoping in any software implementation project. Whether the implementation was for MA, CRM or SFA systems, proper scoping is always beneficial.

Contradictory to the antecedents of Murphy (2018), this research recognizes the need for scoping throughout the process and not only before it starts. By evaluating, measuring and redoing the scoping during the different phases of the process, the company gains valuable information on what has been achieved, what the scope actually is and if any changes are needed to the initial scope. Of course, it is important to establish as accurate of a scope as possible in the beginning of the project, as this helps in, for example, management buy-in and future evaluations. Still, scoping the project should not end when the first scope is finished. As the benefits of implementation are often presented in the scoping phase, it is valuable to see that according to Speier and Venkatesh (2002), in the implementation of SFA systems it is also seen harmful when the benefits are not understood. This finding further emphasizes the similarities in the implementation of MA and other similar ICT systems.

Third, the study suggests that in the implementation of MA, there seems to be rather vast differences in perceiving the project between different organizational departments. However, previous studies suggest that companies often invest in MA and other ICT only when they see it adds value and increases the effectiveness of multiple different departments (Doyle, 2000; Järvinen & Taiminen, 2016). This was not completely clear from the case company's case, though. For example, the sales department and marketing department of the case company had surprisingly different answers regarding scoping and investments of their MA implementation. This contradictory setting was also present in Honeycutt et al.'s (2005) study, where some of the employees did not want an SFA system to be implemented while others did. Thus, the study would find it clear that in all ICT implementations, the implemented software has different levels of impact to different teams: some consider the software as more of an opportunity and some as a disruption or even a replacive tool.

The three contributions combined suggest that the implementation of MA systems and other ICT systems have a lot in common. When discussing implementation, there is always a question of company sizes, operations and even culture, and it is true that all these factors have an effect on how the implementation proceeds. Still, the companies planning to implement any ICT software should pay higher attention to the three antecedents mentioned in this chapter, the scoping, project perception within different organizational teams and content. As a detail, content marketing is the one antecedent other ICT systems might not require, as it is highly concerned with MA only.

5.2 Managerial implications

This chapter includes any managerial implications of the study as well as the guideline for MA implementation in B2B companies. When a company recognizes a need for a new ICT system, they should always have the prerequisites in place before even discussing to start the project. If the company has some ongoing projects in any of the departments that could gain value from the introduction of MA, it would be valuable to get these projects as close to finish as possible before starting the new one. Once the company and its managers are certain they can start a new project with the support it needs, they should figure out what the actual need is that the new MA software would fulfil. It is crucially important to have the need and readiness established to successfully finish the implementation.

From the teams participating in the project, the company should always find a project champion or a manager to guide the process from start to finish. Even though there would not be anyone that would voluntarily take the role, it is worthwhile to name one. In the end, having a project champion helps in various aspects of the project, such as staying on schedule, organizing work and in making sure that the project is moving towards any goals set in the beginning. Having a project champion also tends to help in management buy-in, which is critical for the success of the implementation. If management is not on board, the project might not even start due to their resistance.

Like having a project champion, conducting proper scoping aids especially in the beginning phase of the project. The study and its findings suggest that scoping should be done with the most immense care possible. Making as accurate calculations, estimates, goals and scheduling as possible has multiple benefits that have been recognized in this study. These include, but are not limited to, easier buy-in process, more accurate estimates, better understanding of the company’s needs, better overall results and most importantly, higher chance of success. Furthermore, if the implementation of MA is considered successful, the carry-over effects are often visible in other departments than marketing and in later projects as well.

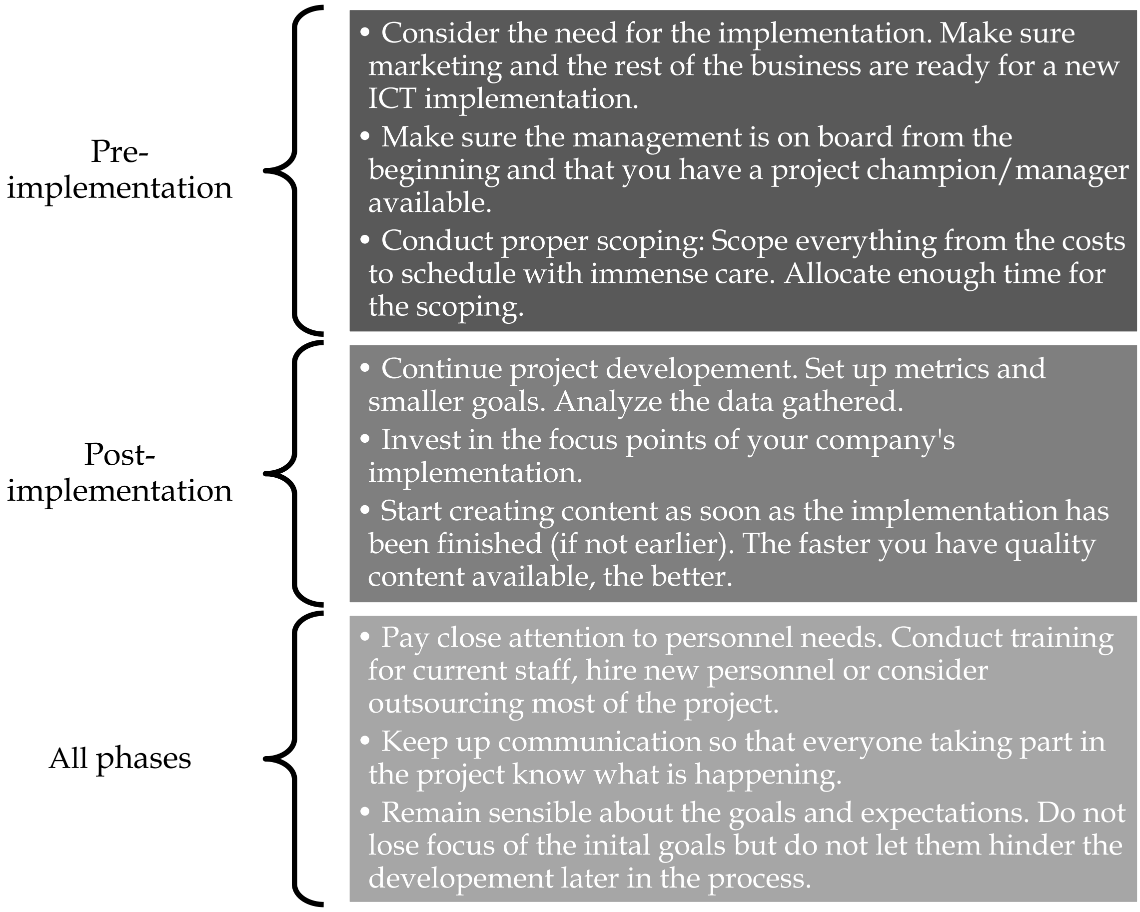

FIGURE 6 Guideline for marketing automation implementation in B2B companies

One of the most important findings of this study is the need for continual efforts, even after the implementation itself has been finished. Companies should always be aware of their current situation and continue developing the systems implemented by, for example, setting up smaller future goals that can be analyzed after they have been reached. By being aware of their situation, the managers can guide investments towards the focus points established either before or during the implementation. This way companies implementing a new ICT system can utilize their complete knowledge and skill base, rather than making the mistake mentioned by Foss et al., (2008) of seeing the implementation project in a too narrow way.

Another key finding for post-implementation is that having relevant, timely and interesting content created is mandatory to utilize any MA software. The content can be created at any point of the process, but the faster the content is available the better. After all, without the content, MA could be considered useless. Here, the investments made towards the focus points, for example marketing personnel, ease the content creation. In this thesis, the case company recognizes the need for further marketing team investments and are hiring new members to the team to run the system and create new content for it.

As mentioned by Murphy (2018), the main antecedent any company should focus on when implementing a MA software is human resources. This finding is also the main focus of the guidelines in Figure 6, where human resources should be paid attention to in all phases of the project. As mentioned by the SD of the case company, proper use of any MA software still requires a lot of manual, human work. This amount might be different between different platforms, but still today the general consensus remains the same; humans are needed. Companies should thus focus on not only figuring out the perfect software for them by comparing all the possibilities in the scoping phase, but also consider what personnel is needed to finalize the project as expected.

Finally, like human resources, the company and its managers should not lose their sense of scope and goals at any point of the process. Sure, managers should always strive for better results and a fast pace but pushing the implementation process or people behind it too hard should only lead to negative outcomes. Changes can and should be made throughout the process, but they should always be based on the previous progress and the original scope. Managers should also encourage continuous communication among everyone taking part in the implementation. Järvinen and Taiminen (2016) found out that seamless cooperation between marketing and sales is mandatory for the implementation to be successful. This study supports the same finding, but also would want to emphasize including other teams in the guideline as well. For example, if the MA platform is of use for services, they should be cooperated with on the same level that marketing and sales departments do.

5.3 Evaluation and limitations of the study

The main goal of this research was to establish and understanding of how MA can be successfully implemented in B2B companies. This effort was supported by identifying antecedents and other factors that could possibly affect the implementation process. To reach this goal, a case study method was used in the empirical study section of this research. By reaching the goals, this study provides useful information for any company considering MA, especially in the B2B sector.

Even though the research goal was achieved, the findings should be understood through a few limitations. First, the case company is of a bigger size within its industry. Thus, the results from this study cannot be generalized to all company sizes. Furthermore, the research and the case company interviews were conducted in Finland. Even though the case company operates globally, this fact limits the usability of the research findings so that they cannot be used in every market and region.

Second, the study was conducted as a case study, where two interviews were the main data gathering source. Furthermore, the case company has a distinguishable organization, history, culture and teams. The case company also was in a specific situation, where they were changing from one MA application to another. Thus, as these factors have affected the research, the results are limited to only this study and its context.

As the researcher was working in the case company during the implementation process, case study was the obvious choice for the research strategy. This choice, of course, limits the data to only one company, but it also enabled the researcher to gather more in-depth data through observations. One of the biggest limitations of the study comes from only having two interviews. This not only limits the amount of usable data gathered, but also the generalizability of the study. Originally, the idea was to interview more than these two, but due to knowledge and time limitations mentioned this was the best sample possible. The observational data was gathered through eight months and focused on the implementation process as well as marketing and sales operations. This enabled the researcher to distinguish more case-specific factors than possible in, for example, a multi company research. Moreover, the time spent at the case company helped the researcher bring forward the setting and results in a better way.

As in all research, reliability and validity of the research must be assessed. Even though these terms are more related to quantitative research, they can be utilized in qualitative research as well, at least on some level. According to Saunders et al., (2019, 213-214), reliability refers to the consistency and repeatability of a research. If in the future someone would want to replicate this study and utilize the same methods and strategies, they should thus reach the same results and findings. In this research, there are many suggestions and comments made throughout the implementation process, making it easier for the research to be replicated. There are aspects, though, that inevitably affect the replicability of the research. For example, because the researcher used a semi-structural interview approach, asking additional follow-up questions based on the answers, the interviews will most definitely vary between this research and any future ones. Furthermore, as mentioned before the case company has its own way of working and has its distinct history which could affect the interviews to some extent.

Validity refers to how accurate the measures, analysis and findings are to the subject at hand and how they explained what happened in the research (Saunders et al., 2019, 213-214). Even though the findings cannot be generalized due to the fact that the research was conducted as a case study, the findings in the research were justified. Justification was done with data gathered from the interviews, the observations and notes written from 2021 onwards. Hence, the findings can be deducted to be conclusive for this case study, and also provide backbone for future research regarding the subject. It should be noted still that qualitative research like this one is never entirely objective.

Overall, the objectives set in the beginning of this research have been met. The antecedents of MA and implementation were distinguished and categorized based on the original framework by Murphy (2018). By distinguishing the antecedents, the researcher was able to investigate how these antecedents impact the successfulness of the implementation process. The implementation process of the case company was studied through interviews and through eight months of observations.

Through the analysis of the antecedents, the case company and the outcomes a guideline for MA implementation in B2B companies was created. Because of the similarities between different ICT systems, CRM, SFA and MA, the guidelines presented in Figure 6 can also be helpful for other ICT systems than MA as well. Furthermore, the guidelines are especially helpful for B2B organizations that have not yet implemented a MA software or want to change between two systems.

In the end, this research highlighted and brought new insights to still very new MA research. Such insights include information regarding MA implementation within a B2B setting, sales and marketing co-operation, content creation and human resource needs. The study can also be utilized for any ICT system implementation or even by ICT system providers to improve their offering towards B2B customers.

5.4 Suggestions for future research

With the managerial implications and usefulness for companies considering investment in MA, this study provides insights into possible future research. After all, as this study was a case study focusing on one B2B company, the results cannot be generalized, and thus further research is needed regarding the implementation of MA and other ICT systems.

The first, and most clear future suggestion comes from the scope of this study. As the study focused only on one B2B company with a specific industry and culture, future research similar to this one would be beneficial in other organization types. The studies could focus on differences between these organizations and how vast the differences are. Furthermore, it would be interesting to see if there are differences between B2B and B2C sectors. For example, future research could study whether project scoping in MA implementation is seen as valuable as it was in the case company.

One of the research goals was to find out whether the implementation of MA and other ICT systems are similar. In the results section of this thesis, it was suggested that the systems share such similarities that it is inevitable to have somewhat comparable processes. Some differences were noted, but the comparability is still notable. The researcher would suggest the differences and similarities further, and more thoroughly than in this research. At the same time, future research could focus on how different types of employees or departments see the implementation process. For example, some research could study how services see the value of MA and how they could benefit from implementing it.

As MA has not still been comprehensively studied in academic research, there are still many possible research paths to be discovered. An example could be social media and the efficient use of content marketing in MA. The common idea is that companies can benefit from both efficient usage of its marketing systems and employee activity on social media. These both aspects could be studied further from the marketing implementation perspective; how does MA affect employees' activity on social media and how MA software changes the views of the company's social media activity overall.

Finally, as in all business, customers are the number one focus point, or at least they should be. MA has many possibilities of increasing the customer interaction and the knowledge a company has about their customers. In the case company, MA helped the sales team understand what their customers need better, as the information flowed from MA to the CRM system in a superior way. In the future, as MA and other ICT systems develop further, research should study the new possibilities for customer interaction and customer opinions through data. This information would be useful for both the companies implementing a MA software but also for the providers as they would learn ways to further improve their systems.

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APPENDICES

Appendix 1 Interview Questions

1. What are the main goals for your company's marketing in your view? Also, could you open up your marketing/business strategy for me?
2. Can you shortly talk me through the steps during your marketing automation implementation?
3. Were there any business changes before the implementation process?
    a. Was there proper scoping done from your perspective?
        i. If yes, how do you see this helped the implementation?
4. How did your managers see the implementation process? Were they on board from the start or did they need convincing?
5. Did you find someone as a project champion during the project?
    a. How valuable do you see having someone as a project champion?
6. How do you see your content marketing? Did anything change due to marketing automation?
    a. Did you have content in place before the implementation?
7. How do you see the project results overall?
    a. Did they show up slower or faster than expected?
    b. Were the set goals unrealistic?
8. Do you know of any investments during or after the implementation process?
    a. Are you planning on investing on marketing automation in the future?
    b. Do you see that personnel investments are important for marketing implementation success?
    c. Did you hire external help for the marketing automation platform?
9. How did the marketing automation implementation go overall?
    a. What was your role in the implementation process?
    b. Would you have wanted more training for the platform?
10. Anything else you would want to mention?