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Master's Thesis

Marketing Automation in a B2B Company

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ABSTRACT

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In this master's thesis, recommendations are developed for the case company Konecranes Plc to implement and use a marketing automation tool in the marketing of industrial cranes sold under Konecranes brand. Recommendations have been collected from existing scientific and consultative literature related to marketing automation and by interviewing representatives from Finnish companies that produce investment goods for global markets and use marketing automation. In addition, representatives from two marketing agencies providing services related to marketing automation implementation and use are interviewed. The already planned actions by the company as well as features of the selected tool are considered in the recommendations.

The recommendations consist of requirements for implementation and actions in the implementation, processes of using the system, division of roles and responsibilities, metrics related to system use, IT landscape around the system and ways to reach compliance with the European Union General Data Protection Regulation in marketing automation and with the help of it. The recommendations also present best practices and typical challenges and their solutions gathered from the literature and other companies.

Considering the limitations of the study, the recommendations are possible to be generalized to other companies. Global companies manufacturing investment goods should aim for efficient use of the system with unified processes that are tailored for different business area needs and local conditions. To ensure the efficient use, it is important that both sales and marketing participate to the system implementation. Benefits of the system should be highlighted to them and sufficient competence to system use with training should be created.

TIIVISTELMÄ

Tekijä: Petteri Pirinen **Työn nimi:** Markkinoinnin automaatio B2B-yrityksessä	
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Tässä diplomityössä luodaan case-yritys Konecranes Oyj:lle suositukset markkinoinnin automaatiotyökalun käyttöönottoon ja käyttöön Konecranes-brändin alla myytävien teollisuusnosturien markkinoinnissa. Suositukset on koottu markkinoinnin automaatiota käsittelevästä akateemisesta ja konsultatiivisesta kirjallisuudesta sekä haastattelemalla edustajia sellaisista globaaleilla investointihyödykemarkkinoilla toimivista suomalaisista yrityksistä, jotka käyttävät markkinoinnin automaatiota. Lisäksi työssä on haastateltu edustajia kahdesta markkinoinnin automaation käyttöönottoon ja käyttöön liittyviä palveluita tarjoavasta markkinointitoimistosta. Suosituksissa huomioidaan myös yrityksen jo suunnittelemat toimenpiteet sekä valitun työkalun ominaisuudet.

Suositukset koostuvat järjestelmän käyttöönoton asettamista vaatimuksista sekä käyttöönottoon liittyvistä toimenpiteistä, järjestelmän käytön prosesseista, roolien ja vastuiden jaosta, työkalun käyttöön liittyvistä metriikoista, IT-ympäristöstä järjestelmän ympärillä sekä tavoista saavuttaa Euroopan unionin tietosuoja-asetuksen vaatimukset markkinoinnin automaatiossa ja sen avulla. Suosituksissa esitellään myös kirjallisuudesta ja muista yrityksistä kerättyjä parhaita käytäntöjä sekä tyypillisiä haasteita ja niiden ratkaisuja.

Suositukset on työn rajoitukset huomioon ottaen mahdollista yleistää myös muiden yritysten tarpeisiin. Globaalien, investointihyödykkeitä valmistavien yritysten tulee pyrkiä järjestelmän tehokkaaseen käyttöön yhtenäisillä, mutta liiketoiminta-alueiden tarpeisiin ja paikallisiin olosuhteisiin mukautetuilla prosesseilla. Järjestelmän tehokkaan käytön kannalta on tärkeää osallistaa käyttöönottoon sekä markkinointi että myynti, korostaa näille järjestelmän tuomia hyötyjä sekä luoda koulutuksin riittävä tietotaito järjestelmän käyttöön.

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I would like to thank supervisors Juha Väätänen and Anssi Tarkiainen for their guidance and valuable advice. I would also like to thank Jari Myyryläinen from Konecranes for support and ideas. I would also like to thank my family for their support now and always.

Helsinki, 26th of April 2018

Petteri Pirinen

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LIST OF ABBREVIATIONS

B2B	business-to-business
B2C	business-to-consumer
BI	business intelligence
CRM	customer relationship management
ERP	enterprise resource planning
GDPR	General Data Protection Regulation
HQ	headquarters
IoT	Internet of Things
IT	information technology
KPI	key performance indicator
MQL	marketing qualified lead
PoC	proof of concept
ROI	return on investment
SEO	search engine optimization

1 INTRODUCTION

1.1 Background

Marketing automation has attracted increasing attention in the business-to-business (B2B) sector. It offers new, promising opportunities for sales (Järvinen & Taiminen 2016) and helps to increase the value of a company (Swieczak 2013). It is said to be one of the most valuable tools of marketing nowadays (Templeman 2015). Those B2B companies which are performing well have more likely adopted marketing adoption than their struggling competitors (Real Magnet 2016).

Marketing automation is seen to be the only contemporary solution to address the challenges which the development of technology and increase and fragmentation of demand as well as more complex customer lifecycles and increased amount of data available have brought (Burka 2015; Todor 2016). To achieve the desired results, companies not only could but they must apply marketing automation as it facilitates dialogue with more demanding customers by immediate and individualized responses. It also gives possibility to track success or failure of marketing and prepare for future better than before. It helps to keep up with increasing competition. (Todor 2016)

Marketing overall has become more complex nowadays (Grossberg 2016). It is nowadays more central in the interaction between a company and its customers (Grossberg 2016). Marketing automation is essential in customer engagement (Del Rowe 2016).

The rise of marketing automation was predicted in the late 1990s by forecasting the appearance of systems that would take care of the operative marketing and free the marketing resources to strategic planning and execution (Bucklin et al. 1998). The first automation software emerged in the 1990s and the business started to grow rapidly in the two first decades of 21st century. Numerous acquisitions took also place (Ioana 2016), through which such large information technology (IT) enterprises as Oracle and IBM have entered the market (Burka 2015). CMO Innovation editors (2017) cite a research by Grand View to point out that the industry will keep growing. Klie (2015) cites insights of Frost & Sullivan who also predict growth of the industry, driven by for example innovations that meet customer need better.

Nowadays there are more than 200 solutions available (Ioana 2016). The most popular way of providing a software is a cloud service (CMO Innovation editors 2017) which is distributed as a software as a service with a monthly fee. The marketing automation market can be divided to two big categories based on targeting of the software. Some products are targeted for small businesses and some for large enterprises. There is also targeting for more specific niches. (Ioana 2016)

Little research is done on marketing automation (Ioana 2016). Järvinen & Taiminen (2016) point out that not much is known about how B2B companies can utilize marketing automation in different parts of sales process. This thesis addresses this research gap by conducting a case study on marketing automation implementation in a B2B company.

Among other B2B companies, Konecranes has decided to implement marketing automation in its marketing to get the benefits marketing automation provides to marketing and sales and to keep up in the development of the B2B sector. Marketing automation enables Konecranes to centralize and harmonize marketing processes and automate and customize campaigns so that marketing runs in the most effective way. Another driver for marketing automation implementation in Konecranes is to ensure that its customer data handling meets the requirements of the European

Union General Data Protection Regulation (GDPR) and the point of view of GDPR compliance is also taken.

This thesis provides Konecranes recommendations to implement and use the system in the marketing of Konecranes industrial cranes based on scientific research, insights of marketing automation professionals and benchmarks from companies which have already implemented marketing automation, given the targets of Konecranes and the limitations the system features set. Roles and responsibilities in the organization are determined following examples from interviewed companies. Potential problems are pointed out and solutions to them as well as ways to prevent them in the first place are presented. Marketing automation software is fitted into Konecranes IT landscape ensuring the GDPR compliance of customer data handling. Ways to measure success of the implementation are provided in the forms of key performance indicators (KPI). A roadmap is provided to determine which actions are taken and in which order.

Konecranes selected the marketing automation software vendor and made the investment decision in early 2018, before this research was begun so this research concentrates in the implementation and usage of such system, not whether a system should be acquired or not and which vendor to select and why.

Konecranes has multiple business areas and business units (Konecranes 2018b; Konecranes 2018d). Marketing automation will be implemented throughout the company but the usage of the software will be tailored inside the business areas to meet the specific needs of these. Due to the needs of the company, this thesis concentrates on the business unit Industrial Cranes and cranes sold under Konecranes brand so marketing automation implementation plan is based on the needs which this setting causes.

1.2 Research questions

Based on the research gap and what the case company is willing to gain from the research, this thesis provides an answer to the research question

How could a company like Konecranes utilize marketing automation in the marketing of investment goods?

The research question has been divided into sub-questions to divide the recommendations under sub-topics. These are

How should Konecranes implement marketing automation?

How should Konecranes use marketing automation?

What kind of best practices should Konecranes follow?

1.3 Research methodology

This study is an exploratory qualitative multi-method research having also features of a descriptive study. The selected overall research strategy is embedded single-case study but data is also gathered through multiple cases. There is only one case company, Konecranes, to which the study concentrates. The other cases, samples are selected through purposive sampling to be homogenous and extreme samples. The samples are four Finnish companies producing industrial goods for global markets and two marketing agencies providing services related to marketing automation and use. The data from these samples is collected through semi-structured interviews with company representatives that are specialist of marketing automation in the organizations. Data collection about the situation in the case company is collected through semi-structured interviews with company employees and participant observation in a workshop in which the implementation and use of marketing automation was planned. The collected data is analyzed and conclusions are drawn based on this analysis to provide the case company recommendations.

The following table 1 summarizes the sources of data.

Table 1. Data sources.

Data source	Data source detailed	Gathered data
Literature	Scientific articles, books, theses, magazine articles, web sites, Konecranes material	Definition of marketing automation, use, requirements, best practices, challenges, KPIs, case company current state
Interviews	6 companies, representatives e.g. managers and specialists, in addition two Konecranes managers	Implementation of marketing automation, requirements, use and processes, roles and responsibilities, metrics, IT landscape, GDPR compliance, best practices, challenges, case company current state, tool capabilities
Participant observation	Marketing automation workshop	case company current state, tool capabilities

1.4 Targets and limitations

By interviewing the representatives of companies either using marketing automation or specialized in it, the thesis aims to set a benchmark which is used as a base to provide the case company recommendations on how marketing automation should be implemented and used. These recommendations can be generalized to provide managerial implications. The results are also compared to the existing literature on marketing automation to provide theoretical implications.

Due to the methodology of this research, the research has many limitations. The data is gathered only from Finnish companies manufacturing investment goods and Finnish marketing agencies. There are no companies from other countries or companies operating on different types of industries. The scope of the research is also very limited due to the goals, it concentrates only on one business unit of one company. Also some conditions in which the research is conducted, such as the selection of the tool, are given and recommendations have to be based on these conditions.

1.5 Structure of the report

The first part in the thesis after introduction is a literature review, which first provides background and context to marketing automation usage in B2B companies by describing features and development of B2B marketing and the buying process in B2B markets. After this, existing literature about marketing automation is reviewed to first gain understanding what marketing automation is and how it is used and then providing theoretical background to requirements, best practices, problems, their solutions and key performance indicators.

Literature review is followed by a detailed description of the methodology of the study. Next, an overview to current situation in Konecranes is provided. First, the company is presented briefly. The current sales and marketing process of Industrial Cranes business unit is described which is followed by presenting the current IT landscape of Konecranes. In the next part, the data gathered from the interview is summarized.

The empirical part is followed by a discussion in which theoretical and empirical results are used to provide answers to research questions. These answers form recommendations for Konecranes. Theoretical and empirical findings are compared to draw theoretical implications. Recommendations for Konecranes are generalized to provide managerial implications. Last, limitations and suggestions for further research are discussed. Finally, conclusions are drawn.

The following figure 1 illustrates the thesis structure and how different chapters are linked to each other.

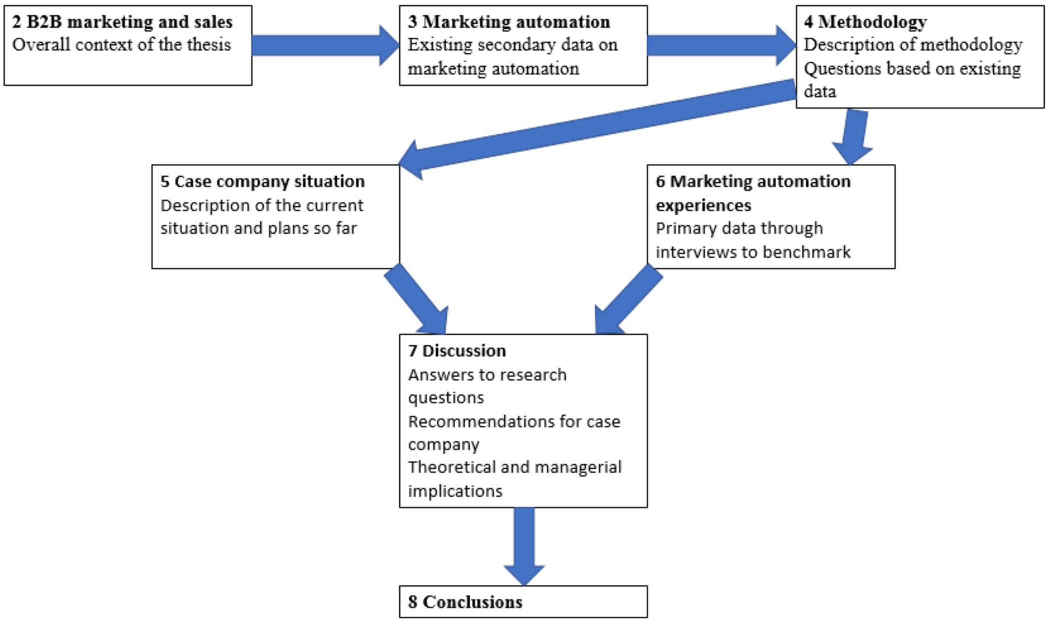

Figure 1. Structure of the thesis.

2 B2B MARKETING AND SALES

This chapter reviews literature on business-to-business marketing and sales. It begins by describing the features of B2B marketing as well as its development over time due to digitalization. Next, an outline of the B2B buying process in general way is presented and then from the point of the view of seller organization with the framework of sales funnel. The aim of this chapter is to provide the background and context in which B2B marketing automation is used. This context shapes why marketing automation is used as it is used.

2.1 Business-to-business marketing

Business-to-business markets mean markets that are for products and services bought by businesses, institutions and governments for consumption, use incorporation or for resale. In these markets, industrial goods are bought to form or facilitate the production process. (Hutt & Speh 2013, 4) There are certain characteristics which distinguish B2B markets from business-to-consumer (B2C) markets. These include typically bigger value or unit purchases, more technically complex products, higher buyer risk, longer buy times, more complex decision-making units, professional purchasers, closes buyer-seller relationships, derived demand and reciprocity. (Minett 2002, 3)

In B2B markets, companies consider customers as assets. Companies need to identify, initiate, develop and maintain profitable customer relationships (Hutt & Speh 2013, 10-11). Customer relationships in B2B market consist of active participation of both the buyer and seller, considering relationship as reciprocal investment meaning that both parties commit a lot of resources in it, amount of participating people from both organization being high, supplier's contribution to customer activity, i.e. how the supplier can best contribute to the clients' activity and stability of these relationships (Michel, Naudé, Salle & Valla 2003, 37-38)

Establishing and maintaining relationships is done by relationship marketing meaning all activities related to establish, develop and maintain successful relationships with customers. (Hutt & Speh 2013, 61)

Minett (2002, 128-129) states that the objective for B2B marketing should be to increase awareness among potential customers by making them to understand what the company is all about; what is their way to differ from competitors and what are their values. It should inform and educate customers.

Minett (2002, 130-131) sees B2B marketing as an iceberg: first some random receiver on the surface receives the marketing message and after that might take it below surface to an opinion leader. If this triggers interest and communications with selling organization, the sales force continues providing marketing messages in personal meetings with the potential customer.

Personal selling has been a major marketing activity in B2B marketing (Hutt & Speh 2013, 338). Direct marketing and sales promotion are also important activities. The role of internet in marketing has grown to be crucial. (Hutt & Speh 2013, 312; Jobber & Lancaster 2009, 33) Internet has had a huge effect on how companies get things done. Also new patterns of behavior have emerged. (Michel et al. 2003, 441) In B2B marketing context, internet can be used for building and maintaining business relations, advertising and branding. Various channels such as websites, emails and search engines can be used for online marketing. (Haig 2001, 81, 93, 105, 121, 159) Companies should provide multiple channels, let customers choose which of them they want to use and enable easy movement between different channels (Minett 2012, 137).

In general, internet forms an integrated information chain. The quantity of exchanged data has grown and communications have become quicker. As internet has speeded up transactional purchasing processes, there are more resources to put on strategic purchases which in turn have not completely moved online. (Michel et al. 2003, 443-446). Those exchanges in the B2B market in which customers know exactly what they want are easier to conduct purely online (Minett 2003, 135)

Customer Relationship Management (CRM) software have recently gotten a crucial role in customer retention as it eases retention activities (Haig 2001, 7). It is used to organized management of customer relationships both in customer acquisition and retention. In addition of being just a software, CRM can be as a strategy that maximizes profitability and customer satisfaction by implementing customer-centric process. (Buttle 2009, 4) CRM collects information about customers in each touchpoint to build a complete picture of customer characteristics, behavior and preferences. This helps to build more effective customer segmentation. (Strauss & Frost 2009, 32-33, 355) Also user behavior on a website in general can be used to personalize offering and help future selling (Michel et al. 2003, 457-458).

The electronic commerce, eCommerce, has led to a situation that companies have to reach individual users with different information profiles and levels of expertise. Although being able to reach anyone anytime anywhere, companies should not forget targeting. (Jobber & Lancaster 2009, 362-364) With the information gathered from customers, marketing mixes can be customized electronically and automatically to the individual level but still distributed to a large amount of people (Strauss & Frost 2009, 33). This is important as in the internet users are in control of what content they view and do not view so the messages must capture and hold audience attention (Strauss & Frost 2009, 283)

D’Haen & Van den Poel (2013) quote Monat (2011) by stating that determining sales leads is often based on guesswork or intuition which leads to waste of resources and potential losses of sales. It takes 20 percent of the time of salespeople to select prospects (D’Haen & Van den Poel 2013).

Marketing automation combines the most recent needs and features in one solution. The behavior of the customer is tracked and automated actions are done based on it (Heimbach, Kostyra & Hinz 2015). Marketing automation is also closely related to CRM and increases its effectiveness (Wood 2015). As marketing automation provides sales with only the most high quality leads, the efficiency of sales is increased (Grossberg 2016).

The following figure 2 sums up and illustrates the development of B2B marketing leading to the emerge of marketing automation. It shows how the development takes places in multiple ways simultaneously rather than being simply linear.

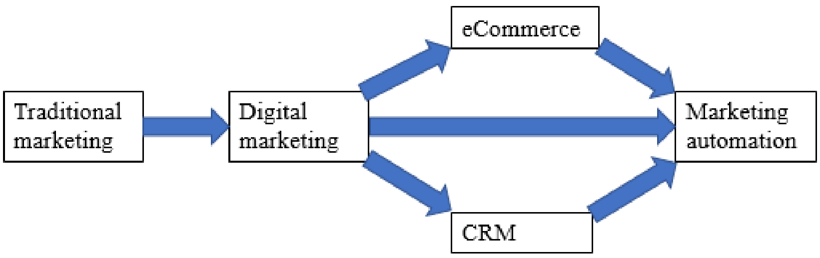

Figure 2. The development of B2B marketing.

2.2 Business-to-business buying process

The purchasing function of a B2B company has various goals. The purchasing function evaluates not only the initial purchase price but also the total cost of ownership. (Hutt & Speh 2013, 55) Also emotional factors such as office politics and personal liking or disliking affect the purchase decision (Jobber & Lancaster 2009, 96-97).

A B2B purchase is a process consisting of multiple small or incremental decisions which eventually lead to the final choice (Hutt & Speh 2013, 35). Multiple people in the purchaser organization buying center are involved in the purchasing process forming a decision-making unit or buying center. (Jobber & Lancaster 2009, 92)

People in the decision-making unit include initiators initiating the purchase process, users who will actually use the product, influencers who influence the process by for example defining specifications, advisers who suggest product and supplier criteria, deciders who decide the requirements, approvers who authorize the proposed actions, buyers who do the actual supplier selection and sales negotiations and gatekeepers who restrict the information flow to other people in the buying center by for example controlling which salesperson speaks to whom. Various aspects such as performance or the economics of the product influence different people. Both these individual preferences as well as company needs influence the decision making. Different people have different relative power compared to each other. Small businesses concentrate on key buying influencers whereas large enterprises target as many participants as possible. It might be that one person has multiple roles in the process, even all of them. It might be hard from the supplier side to identify all people participating in the process. (Kotler & Keller 2016, 216, 218; Hutt & Speh 2013, 52-53; Michel et al. 2003, 67-68)

Michel et al. (2003, 65-65) list four goals for purchasing. These include quality meaning that demands and timetables are met, competitiveness meaning that it aims to negotiate the lowest compatible price, availability and security of supplies and creativity, meaning looking for new, more cost-effective products emerging in the market. Recently, the broadened responsibility of a purchase function has led to a situation that customers are participating in supplier processes such as new product development to ensure that their needs are met in the best possible way.

Purchasing of industrial goods can be defined as a new task purchase or a modified rebuy. New task means that a product is purchased for the first time and modified rebuy means purchasing a similar product than before but for example with different specifications or price. (Kotler & Keller 2016, 215) In modified rebuy, the company can be satisfied with the existing supplier but sees that reviewing other alternatives is also beneficial (Hutt & Speh 2013, 39).

New task situations can be divided into judgmental new task situations and strategic new task decisions. Judgmental new task situation means that evaluating alternatives is difficult and a moderate amount of information is searched and moderate number of tools are used for evaluation of key aspects. Strategic new task decision means a situation that the decision poses an extreme importance to the purchasing company both strategically and financially. (Hutt & Speh 2013, 36-37)

Modified rebuy can be divided into simple modified rebuy and complex modified rebuy. Simple modified rebuy consists of narrow set of alternatives and moderate amount of information search and analysis. Complex modified rebuy involves large amount of alternatives, active information search and careful consideration of long-term benefits. (Hutt & Speh 2013, 39). Minett (2002, 5) state that B2B purchases range from trivial, low ticket items to major capital investments. Purchases that fall in between are mid-range purchases.

The buying process begins when a need is recognized, either through internal stimuli such as company requiring something or external stimuli such as promotion triggering an idea. In the next stage, general need description, the general characteristics and needed quantity are determined. If the purchase is more complex, such characteristics as durability and reliability are determined. This is followed by product specification, in which more detailed technical specifications are determined and standards which suppliers have to meet are set. (Kotler & Keller 2016, 220-221)

In the following stage, the supplier is searched through contacts with other companies, advertisements, tradeshows and the internet. In the internet, purchasing can be done for example through catalog sites, vertical markets, sport markets and buying alliances as well as through company buying sites or e-procurement sites. In this stage, marketing should make the potential buyers sales-ready leads through promotion. Leads have to be high quality and there should not be too much of them, so quality should be preferred over quantity in lead generation. (Kotler & Keller 2016, 221-222)

In the next stage, supplier candidates are asked to submit a proposal. After the proposals are evaluated, a few suppliers are invited to give more detailed presentations of their offerings. The offerings are evaluated according to situation-specific criteria in the next stage, supplier selection, and the best supplier is selected. After that, in the order-routine specification phase, the final order is negotiated and such aspects as technical specifications, quantity, delivery time and warranties are agreed. (Kotler & Keller 2016, 225-226)

In the last stage, performance review, the buyer reviews the performance of the supplier to determine whether the product or service is performing as it should be. If not, necessary actions such as negotiating for lower price can be taken with the supplier. The review also determines the future of the relationship with the supplier; whether it is continued, modified or terminated. (Kotler & Keller 2016, 226)

All of these phases take place in the new task purchase. Product specification and performance review happen always in the modified rebuy but the other ones exist depending on the situation. (Kotler & Keller 2016, 220) Purchase process phases and their occurrence in different purchase processes are summarized in table 2.

Table 2. Industrial buying process phases (Kotler & Keller 2016, 216).

Purchase process phase	**New task**	**Modified rebuy**
Problem recognition	Yes	Maybe
General need description	Yes	Maybe
Product specification	Yes	Yes
Supplier search	Yes	Maybe
Proposal solicitation	Yes	Maybe
Supplier selection	Yes	Maybe
Order-routine specification	Yes	Maybe
Performance review	Yes	Yes

Jobber & Lancaster (2009, 93-94) describe a similar but slightly different purchase process. It starts with need or problem recognition through internal or external factors. In this stage, the salesperson should highlight the differential advantage of their product. The next stage is determination of characteristics, specification and quantity of needed item in which the requirements are set. The salesperson should try to direct the needs in a way that only his or her company is able to meet them. Next, the buying company searches and qualifies potential sources and after this, proposals are acquired and analyzed and after that the proposals are evaluated according to criteria set by different members of decision making unit, ultimately leading to supplier selection and selection of order routine. The last stage is performance feedback and evaluation.

Michel et al. (2003, 69-70) present another version of B2B buying process model by Möller (1981, 1986). It begins with purchasing initiation, either a problem inside the company that needs to be solved or some external demand. Next stage is search for supplier and collecting supplier information meaning listing all potential suppliers. In the next step, short-listing, these suppliers are shortlisted to those that are suitable. In the next stage, the bids are analyzed to find the most suitable supplier, negotiations are held with it and finally the supplier is selected. In the last stage, implementation, the supplier performance is controlled.

Minett (2002, 25-47) presents a buying process containing less steps than the processes described before. The first is the recognition of need which happens through dissatisfaction to what is currently done. The next step is evaluation of options in which it is identified which option is most likely to be able to fulfil the need. In the next step, resolution of concerns possible fears and concerns are resolved. The last stage is post-purchase justification is that individuals participated in the decision making justify their purchasing preferences to other members of the organization.

The following table 3 summarizes the different buying process and shows the relation of different stages with each other.

Table 3. Summary of buying processes.

Kotler & Keller 2016, 216	**Jobber & Lancaster 2009**	**Michel et al. 2003**	**Minett 2002, 25**
Problem recognition	Recognition of a problem need	Purchasing initiation	The recognition of need
General need description	Determination of characteristics, specification and quantity of needed item	Definition of the choice criteria	
Product specification			
Supplier search	Search for and qualification of potential sources	Search for information from the suppliers	Evaluation of options
		Short-listing	
Proposal solicitation	Acquisition and analysis of proposals	Proposal analysis	
		Negotiation	Resolution of concerns
Supplier selection	Evaluation of proposals and selection of suppliers	Choice	
Order-routine specification	Selection of an order routine		
Performance review	Performance feedback and evaluation	Implementation	Implementation

The selling company has to identify the situation in question from the buyer's side to determine the likely purchasing patterns and decision makers of the buyer. This shapes the marketing activities targeted to the company. (Hutt & Speh 2013, 57) In modified re-buys, the decision-making unit often consists of engineers, production managers and purchasing officers and in new buy situations also senior management participates in decision making (Jobber & Lancaster 2009, 99). In modified rebuy situation, the selling company should, depending on the situation, either try to convince the customer to buy its products as soon as possible without consideration of other alternatives or try to have the customer to consider the company offering as alternatives instead of making and immediate purchase. In new task situation, the selling organization may gain advantage by participating actively in the initial stages of buying process by gathering information about the problem in hand and to provide an offering meeting requirements. (Hutt & Speh 2013, 37, 39) The involvement also depends on product in question. For example, when new equipment is purchased, senior management is usually involved (Jobber & Lancaster 2009, 100).

2.3 Sales funnel

The sequence by which a B2B purchase process happens inside the seller company is called a sales funnel. It consists of the sequence through which the buyer goes from customer awareness all the way to customer advocacy. The funnel also contains the division of work between sales and marketing of the seller. (Kotler, Rackham & Krishanaswamy 2006). The funnel involves multiple steps in which progressive messages are used to get the prospect ready for order. Sales funnel makes prospects more familiar, comfortable and trustworthy with the offering. (Coudray 2014) Only certain prospects go through the process (D'Haen & Van den Poel 2013) which leads the illustration of the process to look like a narrowing funnel. At every stage, sales has to decide which prospects to pursue and which to eliminate based on their quality and likability to become customers. This directs the resources of sales to the most promising prospects Also the leads themselves can drop out from the funnel for example if a competitor approaches them with a better proposal. (Söhnchen & Albers 2010)

Typically, the first four steps, customer awareness, brand awareness, brand consideration and brand preference are in the responsibility of marketing. Marketing generates leads which are handed off to sales. The four last steps, purchase intention, purchase, customer loyalty and customer advocacy are in the responsibility of sales. (Kotler et al. 2006) Figure 3 shows the sales funnel.

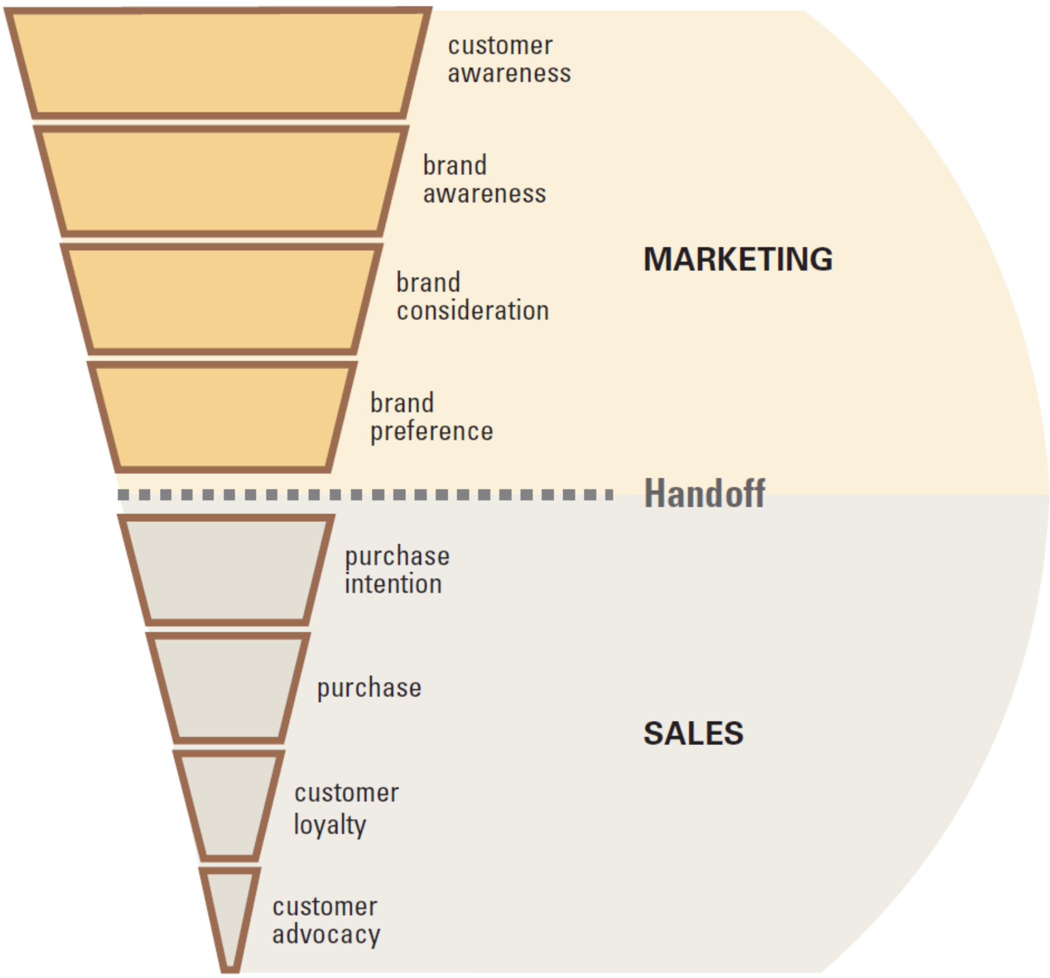

Figure 3. Traditional sales funnel (Kotler et al. 2006, 77).

Sales may develop an own funnel which includes for instance prospecting, need definition, proposal preparation and presentation, contract negotiation and sales implementation. Marketing can also be involved in this funnel. Marketing can participate in lead qualification definition and value proposition development. It can also provide customized marketing materials for individual prospects. Sales on the other can be involved in marketing tasks such as segmentation and positioning. This kind of division of work helps to keep marketing focused on strategic activities instead of individual sales opportunities. (Kotler et al. 2006)

There is no unified terminology to describe the potential customers in the funnel. The definition of suspect and customer are usually unified but it varies by study which are the positions of prospects and leads in the funnel. Suspects are all the new customers available. The list of suspects is narrowed to prospects or leads according to certain characteristics. Prospects or leads are qualified based on how likely they are to respond to communications. These potential customers which are called leads or prospects depending on what the previous set of companies is called. They are contacted and those companies which become clients are called customers. (D'Haen & Van den Poel 2013)

There are also variations in the number and meaning of different stages of the funnel (Söhnchen & Albers 2010). Söhnchen & Albers (2010) define the steps in a more practical way than Kotler & Keller (2006). According to Söhnchen & Albers (2010), the first stage of the funnel is qualification in which companies which they define as prospects are evaluated by using public sources, internal resources and subjective estimation. The next stage is approach in which the prospect is contacted for the first time. The next stage, product presentation, follows when there is common interest by the prospect and this includes finding out the customer needs and highlighting the benefits of the offering to meet the needs. If the prospect shows pronounced interest, an offer is prepared and submitted in the next stage, design of an offer. In the fifth stage, handling objections/overcoming resistance, possible objections are overcome and remaining issues are solved. The last stage is closure in which the prospect is guided to accept the offer in the most efficient way possible. The figure 4 presents the sales funnel by Söhnchen & Albers (2010).

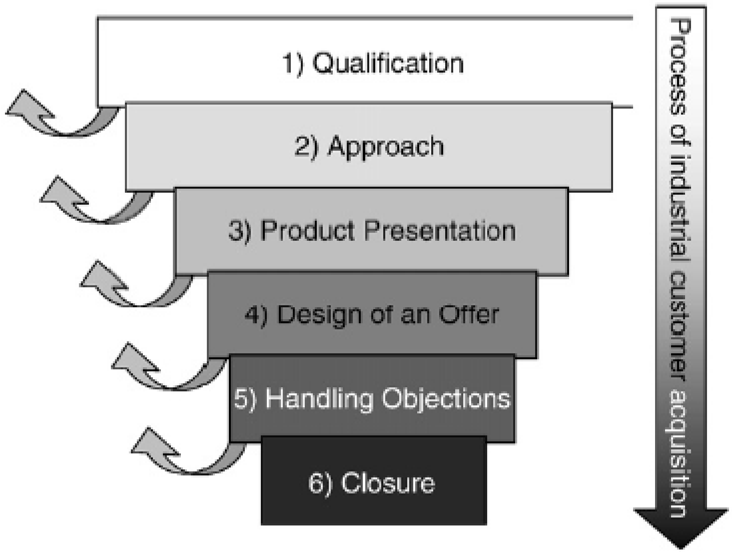

Figure 4. Sales funnel by Söchnchen & Albers (2010, 1358).

Söchnchen & Albers (2010) have left all post-purchase activities out of their model as the acquisition process is finished once the contract is signed. However, Söchnchen & Albers (2010) refer to Johnston & Marshall (2006) when pointing out that in case of some products, continuous service may be offered after the closure of the sales to ensure customer satisfaction.

D'Haen & Van den Poel (2013) point out that sales funnel evolves over time by iteration. Once a suspect becomes a customer the company disappears from the pool of suspects. The sales process also creates cumulative knowledge of what leads to success and what to failure. This knowledge can be exploited to make the process results better.

3 MARKETING AUTOMATION

This chapter reviews literature to gain understanding of marketing automation. It begins with the definition for marketing automation. Next, general usage of the system is described as well as requirements the system implementation and usage set for an organization. Then, best practices as well as potential problems and their solutions are presented. Last part of the review discusses the measurement of marketing automation success by presenting different key performance indicators.

This chapter contains various kinds of metrics rates. Conversion rate means the percentage of visitors who take a desired action such as sales of products, newsletter subscriptions or downloads (O'Rouke 2018). Customer retention rate is the percentage of customers that have remained as customers over a certain period of time (Beard 2013). Cross-sell rate means the percentage of customers that do additional purchases (Tooker 2002). Upsell rate is the percentage of purchases in which customers purchase more expensive products that they were initially planning (Guiding Metrics). Click-through rate means the percentage of people seeing an advertisement that click it (Google 2018). Email bounce rate is the percentage of email addresses that an email could not be delivered to (Campaign Monitor).

3.1 Definition and features of marketing automation

Marketing automation means a software which automates parts of the marketing processes of a company (Heimbach et al. 2015; Todor 2016). In addition to automating current processes, it is also possible to establish new processes (Todor 2016).

The marketing automation system may execute numerous tasks countless times simultaneously (Heimbach et al. 2015) in a such efficiency which is not possible for humans (Wood 2015). It is used to attract current and prospective customers and to build and maintain trust with them (Järvinen & Taiminen 2016). Marketing automation increases the overall efficiency of marketing (Keens & Barker 2009) as well as effectiveness (Bucklin, Lehmann & Little 1998). It also improves the accuracy of reporting due to the big amount of exact data available (Redding 2015).

Marketing automation software merges previously standalone systems such as email marketing, social media marketing, search engine marketing and optimization and analytics and intelligence into one system (Act-On 2018; Burka 2015; Estrada 2015). The figure 5 illustrates the different features that a marketing automation ecosystem might contain.

Figure 5. Example of a marketing automation ecosystem, adapted from Burka (2015).

It can be used to automate such processes as segmentation, customer data integration, database management, planning, campaign management and execution, project management, lead management, customer engagement, budgeting, analytics and predictive analytics reporting (Keens & Barker 2009; Biegel 2009; Aquino 2013). The system bridges inbound and outbound marketing (Ginty, Vaccarello, & Leake 2012, 182) and enables reciprocal communication with customers with optimized costs (Swieczak 2013). The scale of automation can be set by the software user (Ioana 2016).

Marketing automation gathers all user data together (Marketo 2018). It is used to determine the digital footprint of a customer. The gathered data is analyzed and used as a base for decisions related to the sales funnel of this specific customer. Decisions are done automatically and immediately and they are determined by the choices made by the customer. Everything happens in real time in any touch point the system is linked to. (Heimbach et al. 2015; Wood 2015) The amount of data available about current and potential customers is enormous (Keens & Barker 2009) and it is essential to know the outtakes of this data in order to succeed (Estrada 2015). The most important core functionality of marketing automation is this possibility to customize marketing to individual customers. The automation system personalizes content to be useful, timely and relevant to meet the specific needs of the target. Creating this kind of content requires knowledge in the needs of the customer and this knowledge is gathered by the system. (Järvinen & Taiminen 2016) Customization of marketing to individual customers increases the customer satisfaction and loyalty as the content provided for the customer is more relevant to it and matches its tastes. (Heimbach et al. 2015). Such data collection and customization is not possible to be done by humans (Linton 2012; Wood 2015).

Out of the marketing mix activities, marketing automation is used with two of them, pricing and promotion. Marketing automation enables dynamic pricing for individual customers as well as providing customers with individualized promotional content. Individualized content can for example be a customized landing page on a website or a customized offer. (Heimbach et al. 2015) Automation systems are capable to operate in multiple channels simultaneously and this feature should also be exploited. (Aquino 2013).

There is large amount of content available by companies and other customers (Ginty et al. 2012, 182). Marketing automation enables audiences to pull the interesting and suitable content created by companies towards them instead of that companies push this content only to be lost into the huge amounts of information pushed by others. It helps to grab the attention of target audience and the company to become more customer-centric and facilitates better communication with the customers. (Wood 2015) Contacts towards prospects, leads and customers can be not only planned but also opportunistic (Grossberg 2016).

All capabilities provided by marketing automation are critical marketing value for a company (Swieczak 2013). The system helps to increase the productivity of marketing as well as improve decision-making. The conversion rates and retention rates as well as cross- and up-selling are increased. This all leads to increasing sales and higher returns of marketing investments (Heimbach et al. 2015) as well as decreased marketing costs (Bagshaw 2015). The organization’s status is enhanced and equity is increased (Swieczak 2013).

Marketing automation improves also customer satisfaction and brand reputation (Keens & Barker 2009) as it helps organization to become more customer-centric (Redding 2015). It also increases brand awareness by aiming to include the brand in prospect’s consideration set (Woods 2009). It is a source of competitive advantage (Biegel 2009) and growth (Lamont 2016).

The system helps also to align marketing and sales better. This results in for example better lead qualification and follow-up. Prospects can be nurtured with personalized content in order to turn them into customers. (Järvinen & Taiminen 2016; Redding 2015) The relationship between sales and marketing becomes synergistic (Linton 2012) and marketing gets more responsibility in the overall sales process (Putkinen 2014).

Marketing automation gives a better access to the journey of the customer (Wood. 2015) as the data gives a view of prospect actions in all channels (Todor 2016). Because the prospect or lead might move to both directions inside the funnel, the software keeps a track of this behavior and all gathered information is stored all the time and used in the way that the current place in the funnel requires. (Järvinen & Taiminen 2016)

There are many views, whether marketing automation is a part of customer relationship management (CRM) or not. According to Redding (2015) and Viljoen, Bennett, Berndt & Van Zyl (2005), CRM is a bigger entity which among other IT systems includes also marketing automation. More managerial view is taken by Wood (2015) who states that marketing automation complements CRM but does not replace it. Dworkin (2016) distinguishes marketing automation and CRM by pointing out that CRM is used to one-to-one communication whereas marketing automation system communicates with multiple prospects simultaneously.

3.2 Use of marketing automation

The basic use of marketing automation system is related to general marketing management process. The current situation is analyzed based on the data collected by the system, objectives are determined, automated actions done by the system are defined and made, the outcome is measured and required corrective actions are taken. (Heimbach et al. 2015). For instance, certain behavior on a website like viewing only content related to one product, a visitor makes the system to initiate a predefined action, in this case the system sends marketing material related only to that product (Heimbach et al. 2015; Swieczak 2013) or certain opening of content in an email leads to emails related to only that topic (Ioana 2016). The following figure 6 shows the basic framework of marketing automation.

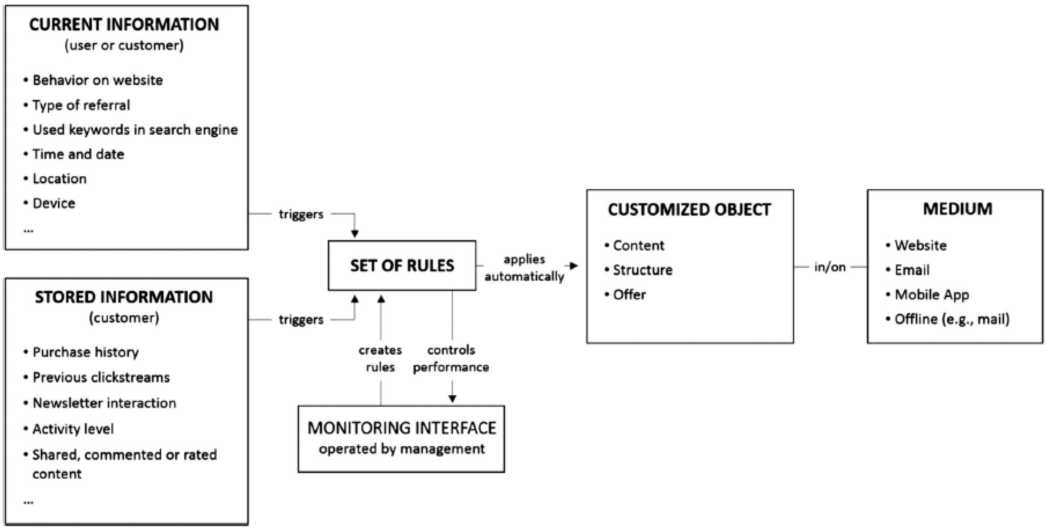

Figure 6. Basic marketing automation framework (Heimbach et al. 2015, 131).

The data is collected for example from the customer, prospect or lead actions such as viewed pages, time spent on them and clickstreams and from customer background such as from which country the user is browsing the website. The current data can also be combined to existing, previously stored customer data such as purchasing history or previous usage of website like recency and frequency of visits. Data of behavior could also be collected from external sources such as social media. (Heimbach et al. 2015; Lamont 2016; Swieczak 2013) External data can also be collected from sources not involving behavioral actions such as customer company website to determine for instance such demographic features as the revenues or amount of personnel of the customer company (Shirazi 2014).

Marketing automation systems gather data about users both in passive and active processes. Passive processes include for example gathering behavioral data or using previously collected data. Active process means asking questions directly, such as asking if the user would like to have sales representatives to contact him or her. Some web content may be accessible only after registration or filling in a form. (Järvinen & Taiminen 2016) In active process, profiling should be done progressively by gradually increasing the level of detail (Todor 2016). Asking too much information at once may make the prospect reluctant to fill the form (Ginty et al. 2012, 185). Progressive profiling helps also to keep the collected data up-to-date. Too sensitive information should not be asked or at least answering to such questions should be voluntary. (Todor 2016)

Marketing automation software use cookies and IP addresses to track the behavior of the users and to distinguish them. They can also do a part of the identification of the user and the company he or she is representing for example by recognizing email or website login but they cannot identify him or her completely unless the user identifies him- or herself by for example filling a contact form (Järvinen & Taiminen 2016; Swieczak 2013). Those not filling the contact form can also be followed up with the software (Real Magnet 2016).

The data gathered by the system can be used as a base of segmenting according to numerous attributes (Heimbach et al. 2015). These include for example the source of the lead, behavioral and demographic data of the lead, prospect or customer, stage in the buying cycle the lead is in, purchase history of the lead and type of contact, i.e. for example current customer or someone who has never bought anything from the company (Ginty et al. 2012, 183). Different marketing actions can then be targeted for different segments. (Heimbach et al. 2015) Determining niches is also possible (Ioana 2016).

Analyzing the data helps company to search for potential prospects (Grossberg 2016). The most potential prospects are moved to sales as leads, the least potential ones are dropped out from the funnel and the remaining are nurtured more before they are either accepted as leads or rejected from the funnel (Dworkin 2016). In order to increase the efficiency of sales, the least potential prospects should not be moved on to sales as leads at all (Grossberg 2016) as the closing rates will be bigger with the most potential leads (Dworkin 2016).

In order to use the data effectively, company has to determine how its ideal potential customer of each offering is like and how are the generic buyers in such an organization (Davies 2015; Grossberg 2016). Sales and marketing should also together agree the criteria of a good lead, meaning a lead that gets a high enough score to be transferred to sales. (Ginty et al. 2012, 188)

The gathered data is analyzed to determine how well the prospect fits to the definition of the ideal customer, how engaged the prospect is with its communications with the company and what is the purchase intent of the prospect based on its actions (Grossberg 2016). This process is called lead scoring. In lead scoring, future intentions are predicted based on the actions of the past (Burka 2015). Lead scoring consists of demographic data such as company size and industry and behavioral data such as website usage, viewing of certain products, downloading certain documents or watching videos. Lead scoring system should be kept as simple as possible. It can be divided into explicit scoring meaning how well a lead fits to the customer profile and implicit scoring meaning how a customer engages with the brand of the company. (Ginty et al. 2012, 186-187) In lead scoring behavior is a stronger indication on purchase intention than the profile information of the user. It should be taken into account that evaluating the leads is a dynamic process as the activity level of the prospect is not static. (Järvinen & Taiminen 2016)

With the collected data, sales gets insights of how much the lead already knows and how the conversation with it should proceed. When the lead goes on in the sales funnel, sales gains understanding of different people in the buying organization of the lead and can adjust the communication based on interests of individual persons. Marketing automation helps to keep a track on lead activity and sales knows which leads have such activity level that they should be targeted (Woods 2009). The prospect can be moved forward in the funnel for example when it is requesting a contact from the sales (Dworkin 2016). Gathering information about the prospect or lead and educating it about the offering and the company makes the initial human contact of the sales easier (Woods 2009). The contact by sales happens also at the right time (Swieczak 2013).

Lead nurturing means a process, in which leads which are not yet ready to do the purchase are engaged and cultivated with individual and relevant content. Lead nurturing can be for example a welcome campaign such as a newsletter or a blog to introduce the brand or an education campaign which educates the customer about the offer of the company. Content such as white papers or customer testimonials can be included in so called why us campaign which differentiates the company brand from competitors and fine-tunes the value proposition to meet customer needs. Buying process can be speeded up with an accelerate campaign such as promotional offers. After the purchase, the relationship with the customer is maintained with a new customer campaign such as a thank you message with plans, details and expectations of the future relationship and retention campaigns such as tips for best practices and reiterations of benefits of the relationship with the seller. The company can use retention to reach customer advocacy. (Ginty et al. 184-185, 190) The system is also capable of streamlining lead management in after-sales operations (Swieczak 2013).

With marketing automation, it can be measured which marketing activities are the most successful by for example analyzing which of the viewers of product information convert into actual customers (Todor 2016) and use this information when deciding which activities to continue, which to improve and which to terminate (Swieczak 2013). Also, the effectiveness of complete promotion channels can be determined and compared with each other (Real Magnet 2016). A software itself can be capable of learning. It can experiment various alternatives of marketing actions such as different kinds of promotional material, determine which one leads to best results and starts to use it the most. This data can also be monitored. (Heimbach et al. 2015)

In addition to new customer acquisition, marketing automation can and should be used to existing customer retention (Aquino 2013). This is easy with the software as it enables reciprocal communication with customers with optimized costs (Swieczak 2013).

Marketing automation software can also be utilized to simple tasks such as distributing mass emails automatically (Heimbach et al. 2015). Social media marketing and using mobile platforms for marketing can also be automatized with the software (Aquino 2013). Part of the operation of the system can be outsourced to an external partner to adjust the workload of marketing department (Keens & Barker 2009). Also, the content generation can be outsourced (Putkinen 2014).

Data gathered by marketing automation is available for reporting. The indicators vary for simple indicators of for example numbers of click to complex indicators such as campaign performance results. Gathered data can also be used in future planning, for example an estimation for return on investment (ROI) can be calculated. (Ioana 2016) The data can be also used to determine the overall contribution of marketing to the generated profits (Swieczak 2013) as well as to track the effectiveness and profitability of each activity in each touch point (Lamont 2015; Real Magnet 2016).

It is important to understand that despite of the term, a marketing automation system is not an artificial intelligence which has its own consciousness. It is a software that does exactly what it is told to do and nothing else. (Järvinen & Taiminen 2016) It cannot create content from scratch either so the company using the software has to create the content which is communicated through the system (Hosford 2011) and the rules according to which the communication happens (Lamont 2015).

In their vision for 2020, Bucklin et al. (1998) predicted that marketing automation software would be able to analyze competitors and react to changes in the competitive environment. Del Rowe (2016) predicts the possibilities Internet of Things (IoT) will bring to marketing automation by describing how the increased amount of devices connected to the internet provides companies possibilities to bring their promotion to new places and to collect more data about their customers.

3.3 Requirements

When setting up a marketing automation system, it is fundamental to determine how the system will be used. The first part of the determination includes deciding what will be customized and how. The second part includes determining the triggers that will cause actions in the system. (Heimbach et al. 2015) Only the features that will make a difference should be adopted (Keens & Barker 2009).

The actual promotional content linked to the system should be adjusted to the marketing automation process (Hosford 2011). It must be ready when the use of system is started, otherwise the software remains unused (Aquino 2013). GDPR requires that any direct marketing has to include a possibility to forbid any further direct marketing. If a website uses cookies, it should be made clear to the user. When giving for example contact information, the company data protection policy must be provided and the user has to indicate that he or she has read it and accepts it. (Konecranes 2017a)

The marketing processes have to be suitable for marketing automation to be implemented properly. If this is not done, the system does not bring benefits it is supposed to bring. (Wood 2015) There should be an integrated lead management process in place. (Hosford 2011).

To use marketing automation, in addition to the automation system itself a proper data storage is needed. Relevant data has to be available for the system to be processed and applied effectively and efficiently. (Heimbach et al. 2015) It is important to understand which kind of data is needed and how it is handled and should be handled inside the organization. The data must be accurate and consistent and all data regarding a customer should be available in one view. Every customer should be identified based on the data. The ownership of data governance in the organization should be determined. Necessary data from external sources should also be included in the needed set of data. (Keens & Barker 2009) The data should not be generic but precise instead (Aquino 2013). Correct categorization of data helps also reporting (Redding 2015). The marketing automation system should be able create a flexible database and unnecessary data such as duplicates should be removed (Durga 2015), however no valuable data shall be lost (Aquino 2013). When implementing the system, the existing data, processes and systems should be understood. This includes for example mapping lead flow process and removing old an inaccurate data from CRM. (Ginty et al. 2012, 191)

Data management should be compliant with legislation (Wood 2009). For example, companies in the European Union must process all their personal data, including customer data in compliance with the GDPR. Companies must minimize the amount of customer data to contain only the absolutely necessary information.

Access rights to this data has to be restricted to those who need the data in their work. Customers should be allowed the right to forbid direct marketing targeted for them. They can request the company to tell which information it has stored about them, they can correct the data, restrict its modification, restrict or stop its processing and request anonymization or complete removal of the data. Data which is not relevant for the company anymore must be removed without a request after a certain period of time. Companies not handling their data according to GDPR regulations may face sanctions of 20 million euros or four percent of the annual turnover of the company. (Konecranes 2017a)

It is important that there are employees who have good technological knowledge to set up the system and employees who have good knowledge on marketing to use the system in a right way to reach right targets. IT and marketing must also work closely together when implementing the system. (Heimbach et al. 2015; Keens & Barker 2009; Wood 2015) IT has to understand marketing requirements and marketing has to understand IT specifications and capabilities (Redding 2015). Marketers need also be more proficient when using the system (Lamont 2015), they should have technical, analytical and communicational capabilities (Del Rowe 2016; Putkinen 2014).

The team administrating marketing automation should include people from marketing, sales, IT, communications and possibly from the product team. Responsibilities and accountabilities should be clearly defined. This team should be trained for all the best practices as soon as pieces of information about the usage are gathered and they in turn should train the users of the system. (Ginty et al. 2012, 191-192)

The marketing automation system has to be integrated to the existing IT landscape. This is a complex task requiring expertise in for example in data management and marketing process workflow. (Keens & Barker 2009) The most important system to which marketing automation must be integrated is CRM as this enables moving the leads from marketing to sales (Dworkin 2016). Integration also helps customer data flow from sales to marketing (Estrada 2015). The system needs to be linked to existing advertising platforms as well (Lamont 2016) such as website and social media (Templeman 2015). If the software is used to analytics purposes, it has to be linked to analytics and business intelligence (BI) software (Burka 2015). The following figure 7 presents how an IT landscape around marketing automation might be.

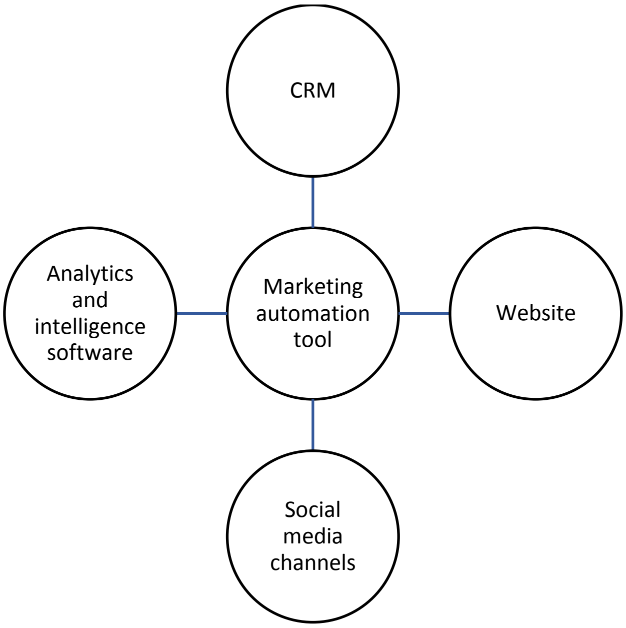

Figure 7. IT landscape around marketing automation, adapted from Burka (2015).

Market automation requires a cultural change within the organization. Marketers need to shift from promotional and product-oriented marketing to providing customers with specific content, i.e. to adopt the point of view of the customer. (Järvinen & Taiminen 2016). Marketers should have process-driven mentality and understanding of strategic, analytic and creative aspects of marketing (Biegel 2009). Change can be facilitated by for example training the employees (Järvinen & Taiminen 2016). Järvinen & Taiminen (2016) also propose that employees should be allowed to learn by trial and error but Davies (2015) and Real Magnet (2016) advise that one should not implement marketing automation usage like this. Training is available from external resources, for example the vendor can train the usage of its own system (Biegel 2009). Leadership should also facilitate change in the ways of working (Redding 2016). Various senior stakeholders all over the company have to be with the vision. (Keens & Barker 2009)

To reap the benefits of increased efficiency in sales and marketing, these two departments must be aligned. This is achieved by integrating sales and marketing systems, joint planning and developing a joint marketing and sales funnel. (Järvinen & Tamminen 2016) These two departments should have common business goals and quality of leads should be valued over quantity. (Redding 2015) The alignment is something that is that is required nowadays due to the fact that customers have enough information available to lead the sales cycles (Ginty et al. 2012, 182).

As stated before, marketing automation helps organization to become more customer-centric and to align sales and marketing better (Järvinen & Taiminen 2016; Redding 2015). It can be assumed that as the organization has to become more customer-centric and sales and marketing have to be aligned (Järvinen & Taiminen 2016) the by-product of this change are the benefits the change as such brings to the organization.

The implementation of marketing automation is a lengthy process which may take even years (Wood 2015) and discipline and commitment is needed (Davies 2015). Demands towards the automation will change constantly. The implementation process should be agile and change when needed instead of trying to control the change. To ease the process, the implementation process may be conducted as an iterative process which means that different functionalities are adopted at different points of time. (Keens & Barker 2009) To carry out the implementation successfully, sufficient resources and budget should be in place all the time (Hosford 2011). Reviews and improvements of automation success can be done for example quarterly to increase the effectiveness, efficiency and profitability of marketing automation (Ginty et al. 2012, 197). The system cannot be forgotten, its usage should be updated all the time to meet the changing needs of customers (Del Rowe 2016).

Proper planning is vital before the marketing automation system is turned on for the first time (Dworkin 2016). An implementation plan, a roadmap should be done to guide the implementation process as this helps to keep the long-term goals constantly in mind (Keens & Barker 2009) as long-term goals of implementation are the ones which will have the effect on profitability (Bucklin et al. 1998). Future needs should also be considered beforehand so it will be easier to meet them once they arise (Redding 2015). Every brand needs to have a specific plan which is as well modified when needed. In general, marketing automation will not be successful if proper planning is not made. (Bagshaw 2015)

3.4 Best practices

In general, the key to success with marketing automation is the efficiency and creativity when using the system (Heimbach et al. 2015). A large proportion of communications should be automated by integrating content marketing to marketing automation as this can generate more high-quality leads. (Järvinen & Taiminen 2016) According to Del Rowe (2016) the most important promotion to be automated is website customization. The promotional content distributed through the system should be standardized to be consistent throughout the company. (Ginty et al. 2012, 193)

The knowledge of the customer should be used in an appropriate manner in the content of promotion. One should not be too general and boring but not too detailed and scare the lead with the amount of knowledge the company already has gathered. (Ginty et al. 2012, 189) Included in the suitable communication towards individual leads is the frequency of communications. Different frequencies should be used in different stages of the nurturing process. Frequency should also be in line with how often the lead communicates to the seller. If the lead replies once, it should be replied once. If the lead is not responding anymore, the communications should be stopped at some point. (Ginty et al. 2012, 188)

The automation software are capable of filter contact data and sort out clearly unqualified contacts which include for example incomplete information or misinformation. This feature should be exploited. The system should also rank leads so that the most profitable leads would be contacted first by the sales. The efficiency of sales is increased when the prospects are classified automatically. (Järvinen & Taiminen 2016) Lead scoring should be adjusted over time based on experiences on how well and effectively the scoring system works. (Ginty et al. 2012, 193) There should also be overall follow-ups to see that the system is actually working the way as it should be (Redding 2015).

The marketing automation system should be used to contact leads as quickly as possible. Quick response increases the likelihood that the lead will move further in the sales process. Prospects can be nurtured with emails and the behavioral responses for the communication can be collected and analyzed to profile the customer better. (Järvinen & Taiminen 2016)

Sales should be convinced with the value of the system at once. The system should be piloted with those sales advocates who have high performance and are respected in the organization, collect their feedback and react to it before training the rest of the sales. When a sales advocate is trained, the benefits of the system should be highlighted. The usage of the system should be monitored to reach those who are not yet using the system and convince them to use it. (Ginty et al. 2012, 195)

3.5 Potential problems and their solutions

The implementation of the system is a complicated process (Todor 2016). Companies may lack knowledge of what actually can be automated and what not (Grossberg 2016). On the other hand, system features may not be completely exploited. In that case, the software might become just an expensive email marketing software. (Todor 2016) It might also be a problem to determine where to place needed technical talent. Management might not be targeted to areas where it is needed. (Grossberg 2016).

Many problems may arise already in the implementation stage if the automation is seen just as an IT system implementation instead of understanding that it is a part of a bigger entity. Attention should be given to business process, data management, methodology of implementation and the use of external resources such as partners. (Keens & Barker 2009) It may also be difficult to do the actual system integration (Räsänen 2017).

Mapping and modifying existing marketing business processes can be failed due to several reasons. The time reserved for implementation may be too short so enough time should be reserved. Marketing department may lack the expertise to model and improve the processes so if needed, this work should be done by skilled business analysts either from inside or outside of the company. The required changes may also require approval from higher parts of the organization which consumes time. (Keens & Barker 2009)

It is not enough that the people involved in the implementation have knowledge of the system. The people who work with marketing automation should understand the way of working the system requires. If a new employee is placed to such position, he or she has to be trained to use it. (Redding 2015)

The marketers and IT experts might not understand each other which impedes the implementation process. Therefore, it is important that some of these people learn a way to communicate with each other in a correct and understandable manner to enable smooth communication. (Biegel 2009)

Another problem related to the employees is change resistance among marketing and sales employees. This may affect the system adoption and the efficiency of the use (Todor 2016). Change resistance can be overcome by convincing the employees why it is needed in the earliest stage possible (Tobon 2017).

The importance of data management may be overlooked during the implementation. Especially data privacy compliance may cause challenges as employees may lack the required knowledge. Therefore, experts support should be used during implementation. (Keens & Barker 2009)

One challenge in marketing automation is related to lead qualification. It is difficult to determine the characteristics of a high-quality lead. The definition is company-specific and contains various attributes. (Järvinen & Taiminen 2016) One way to achieve better lead scoring is to set the criteria regionally to meet the local market characteristics. The qualification criteria should be accurate enough to be able to actually distinguish the leads of different quality. (Redding 2015)

One general problem is not thinking everything through in required detail (Redding 2016). Every aspect in for example customer journey or in campaign must be planned (Bagshaw 2015). As companies gather more information about its customers, these should be provided with more specific and personalized content, which consumes more of the limited resources (Järvinen & Taiminen 2016; Redding 2015).

3.6 Key Performance Indicators

The most fundamental metric to measure the effect of marketing automation is the profit or loss. However, it is difficult to determine how big the actual effect to this performance indicator is as so many other factors affect it as well. (Keens & Barker 2009)

Keens & Barker (2009) suggest that a set marketing performance metrics should be in place to measure the success of marketing automation implementation. If the metrics do not exist beforehand, marketing automation should enable their implementation. The marketing performance metrics can be divided to metrics which measure revenue increase and to metrics which measure cost decrease. Revenue increase indicators include for example return on investment, net promoter score and cost per lead. Cost decrease indicators include for instance marketing productivity improvement and cost reduction. These metrics are not a one size fits all solution; used indicators should be selected based on the company objectives and capabilities.

Swieczak (2013) proposes that e-mail marketing effectiveness, click-through rate, conversion rates and return of marketing investment should be considered when KPIs are defined. Swieczak (2013) also suggests that KPIs could be defined by different time requirements such as time needed to approach a lead, time needed to proceed to the next step in a process, number of tasks completed in a certain amount of time or the time needed to complete a process.

Ginty et al. (2012, 193) suggest that the success of marketing automation can be measured by measuring how many leads are converted to opportunities and how much revenues this has generated. Success can be measured in the campaign level by comparing costs and revenues.

Shirazi (2014) argues that instead of measuring the amount of leads generated, the revenues generated by marketing automation should be measured. Davies (2015) notes that all the KPIs should somehow be related to profit generation. According to Järvinen & Taiminen (2016), there should be joint metrics between marketing and sales to measure the success of marketing automation overall outcome.

Indicators should be easily accessible. It should be determined which marketing activities are profitable. Quality of leads everywhere in the pipeline should be determined based on cost-per-lead, cost-per-opportunity and cost-per-customer. (Ginty et al. 2012, 196)

The following table 4 summarizes different KPIs presented in this chapter.

Table 4. Key performance indicators in literature.

Non-monetary	**Monetary**	**Reference**
Net promoter score		Keens & Barker 2019
	ROI	Keens & Barker 2009, Swieczak 2013
Marketing productivity improvement		Keens & Barker 2019
	Revenues generated	Ginty et al. 2012, Shirazi 2014
	Cost reduction	Keens & Barker 2019
Click-through rate		Swieczak 2013
Conversion rate		Swieczak 2013
Time needed to approach a lead		Swieczak 2013
Time needed to proceed to next step		Swieczak 2013
Number of tasks completed in an amount of time		Swieczak 2013
Time needed to complete a process		Swieczak 2013
Leads generated		Shirazi 2014
	Cost-per-lead	Ginty et al. 2012
	Cost-per-opportunity	Ginty et al. 2012
	Cost-per-customer	Ginty et al. 2012

4 METHODOLOGY

Due to the purpose of this research, this study is an exploratory study. Saunders Lewis, & Thornhill (2009, 139) define exploratory study suitable in a situation in which “you wish to clarify your understanding of a problem in a case that you are unsure of the precise nature of the problem”. The research also has features of a descriptive study because it portrays an accurate profile of a situation (Saunders et al. 2009, 140).

The chosen research strategy for the study is case study because this study conducts “an empirical investigation of a particular contemporary phenomenon within its real-life context using multiple sources of evidence” (Saunders et al. 2009, 145-146). Case study is a suitable strategy as this study tries to “gain rich understanding of the context of the research and the processes being enacted” (Saunders et al. 2009, 146) as well as it tries to answer to questions “why?”, “what?” and “how?” (Saunders et al. 2009, 146).

The overall study is a single case study as it concentrates on one organization. The organization is treated as an entity consisting of smaller logical sub-units, in this case business units and departments, and as the study conducts a research on multiple of these, business unit Industrial Cranes and Konecranes as a combination of all business units, it makes the case an embedded case. However, some of the data inside the research is collected from multiple companies in order to increase the reliability of the study. This part of the study is a multiple case study. (Saunders et al. 2009, 146-147)

The study uses non-numerical data which makes it a qualitative study (Saunders 2009, 151). This study is a cross-sectional as it concentrates only on one point of time (Saunders 2009, 155).

The sample for the research is selected through non-probability sampling. This is usually the most practical way of sampling in exploratory studies. Meeting the objectives of the study is also one reason behind this choice, as well as limited resources. (Saunders et al. 2009, 233) The size of the sample is small as the objectives of the research do not require a large sample to be used (Saunders et al. 2009, 234). The resource limitations also require a small sample to be used.

The sampling type is purposive sampling as it enables to select cases that best enable answering to the research question and meet the objectives of the study. It is also recommended for case studies with very small samples which are as informative as possible. (Saunders et al. 2009, 237) Most of the samples are homogenous samples as they focus to only one sub-group which contains only similar members. This allows to study this particular group in depth. (Saunders et al. 2009, 240) In this case this sub-group are companies which produce investment goods to international B2B markets. Konecranes is such company so in order to get the most out of the collected data the other case companies have to be similar. Two samples, the marketing agencies are extreme cases they are special cases which allows to learn the most of the phenomenon and the findings will be relevant in order to understanding more typical cases. (Saunders et al. 2009, 239)

Most of the data is collected with one to one face-to-face semi-structured interviews. Semi-structured interview allows to carry on the interview flexibly according to the context or flow of the discussion (Saunders et al. 2012, 320). Semi-structured interviews are also suitable in an exploratory study and in a situation in which the questions are complex and it might be necessary to vary the order and logic of questioning (Saunders et al. 2009, 323-324).

The interviews were recorded to ensure the reliability of handling the data (Saunders et al. 2009, 339). The records were transcribed to 141 pages of transcript. The data in the transcripts was categorized according to the themes of literature review as this structure is relevant for the data analysis process (Saunders et al. 2009, 492). These themes of interviews with representatives from industrial companies and marketing agencies follow the topics of chapter 3 and case company targets. Some of them also emerged during the research. The themes are implementation, requirements, use and processes, roles and responsibilities, targets and measurement, IT landscape, GDPR compliance, best practices, challenges and changes. Themes of interviews with Konecranes representatives are reasons and targets of implementation, GDPR compliance, planned implementation, use and IT landscape and tool features.

Content analysis was done for the data to make sense of the data and identify core consistencies and meanings (Patton 2002, 453). Data was organized based on these consistencies and meanings to create a consistent entity. This entity forms chapters 5 and 6. Conclusions were drawn based on these analyses to answer research questions and give recommendations for the case company. This forms chapter 7.1.

Interviewing experts is a principal way to conduct an exploratory study. (Saunders et al. 2009, 140). The interviewees can be divided into three categories. Some of them are marketing automation experts from companies like Konecranes, some are from consultancy companies which have conducted marketing automation projects for their clients and some work for Konecranes and they have strong knowledge on marketing automation tools and targets Konecranes aims to reach with the implementation.

Questions for external industrial companies are derived from the literature review. They are about the implementation and usage of marketing automation tools.

Themes regarding for example processes, best practices, problems and their solutions, roles and responsibilities and KPIs were discussed. Complete list of questions for external industrial companies can be found in the Appendix 1. Questions for marketing agencies are almost identical to the questions for external companies but they are about the clients of these companies. The questions are in Appendix 2. Questions for Konecranes employees are related to the capabilities of the selected automation tool, targets which Konecranes wants to achieve and upcoming IT landscape as well as to best practices and challenges the interviewees might know already. These questions are featured in Appendix 3.

The table 5 presents the interviewees. The interviews were conducted in Finnish if the interviewee spoke Finnish as his or her native language, otherwise they were conducted in English. Some of the interviews were conducted in Konecranes offices and some in the offices of interviewed companies. One of the interview was conducted in a café in Helsinki.

Table 5. Interviewees.

Company	**Industry**	**Interviewee**	**Language**	**Date**	**Duration**
Kemppi	welding	marketing manager	Finnish	8th of February 2018	88 minutes
Wärtsilä	energy and marine	manager, marketing automation	English	9th of February 2018	65 minutes
KONE	elevators and escalators	email and marketing automation specialist	English	27th of February 2018	73 minutes

Outotec	metals and minerals processing	head of marketing	Finnish	1st of March 2018	79 minutes
Mirum Agency	marketing	performance lead	Finnish	15th of February 2018	99 minutes
Avaus Marketing Innovations	marketing	head of B2B	Finnish	20th of February 2018	59 minutes
Konecranes	lifting solutions	digital marketing and communications manager	Finnish	14th of February 2018	66 minutes
Konecranes	lifting solutions	marketing manager	English	8th of March 2018	66 minutes

Mirum Agency and Avaus Marketing Innovations are marketing agencies which among other services offer their clients services related to implementation and usage of marketing automation. The customers of Mirum Agency are large industrial and technology companies which are mostly on B2B sector. Most of the customers of Avaus Marketing Innovations are B2C companies. The B2B customers of the company include engineering and manufacturing companies as well as process industry and service companies.

During the research, the author had a chance to participate in a workshop in which the implementation of marketing automation in the whole company was planned. A planning session for the workshop was organized in Konecranes Espoo office on the 13th of February 2018. Some participants were present physically, some via Skype connection as they were located for example in USA, Canada and Sweden. The actual workshop was organized on 10th and 11th of April 2018 at Konecranes Espoo office. All participants were present physically.

Data was collected in both the planning session and the workshop as participant observation meaning that the author participated in the activities of the organization under research (Saunders et al. 2009, 290). The role of the author in the workshop was participant as observer as the identity of the researcher was revealed and he was as involved in the workshop activities like the other people in the workshop. (Saunders et al. 2009, 294)

The data in the workshop was collected through primary observations, meaning collecting what happened and what was said at the time. The observation was descriptive observation as the activities of key participants, particular events and their sequences as well as processes were observed. (Saunders et al. 2009, 296) The data was collected during the workshop sessions and immediately after them by making field notes. The notes were analyzed as part of the overall data by categorizing the data in a similar way as the data collected from the interviews. Categories include Konecranes targets, capabilities of the tool, planned processes, upcoming IT landscape and best practices.

The workshop participants form an internal marketing automation reference group. The reference group consists for example for heads of marketing in business areas and regions, corporate marketing and communications managers, marketing specialists, different IT managers and Vice President, head of marketing and communications of Konecranes. In addition to reference group members, one representative from the system vendor and two representatives from the implementation partner participated in the workshop but not the planning session.

It is typical to use secondary data in a case study in addition to primary data (Saunders et al. 2009, 258). Some of the data in the description of current state is secondary data collected from documentary written materials of Konecranes. These include both public sources such as annual reports and corporate website as well as internal sources such as PowerPoint presentations and the company intranet. This secondary data is used as it provides useful information to partially answer the research question of this thesis. Some of the secondary data helps to triangulate the primary data. (Saunders et al. 2009, 256, 269)

5 CASE COMPANY SITUATION

This chapter gives an overview to the situation of Konecranes as it was at the time of the research. It begins with brief introduction to the company which is followed by a description of the existing buyer journey and sales funnel of the business unit Industrial Cranes. Next, the previous marketing automation experience in Konecranes is briefly introduced. Then, Konecranes targets, capabilities of the selected tool and processes planned so far are presented. Last, the current and upcoming IT landscape is presented.

The data in this chapter is collected from written company sources, interviews with two marketing employees of the company and the workshop held with marketing automation reference group.

The source of primary data is mentioned only if there are contradicting views on some issues e.g. by the two interviewees. The two interviewed Konecranes employees have similar titles so for clarity reasons when their sayings are referred, the exact title in table 5 is mentioned. Literal sources are referenced as in literature review.

5.1 Konecranes in brief

Konecranes is a Finnish stock listed company producing lifting solutions and services. The company employs 16 000 people and its annual turnover is about three billion euros. (Konecranes 2018a)

The history of Konecranes began in 1910 when its former parent company KONE was established. KONE started to produce overhead cranes for pulp, paper and power industry in 1933. The company was separated from KONE in 1994 and KCI Konecranes was formed. The company changed its name to Konecranes in 2006. (Konecranes 2018c).

The organization of Konecranes includes three business areas. Business area Industrial Equipment offers cranes, hoists and material handling solutions for the needs of numerous industries. These products are marketed under brands Konecranes, Demag, SWF Krantechnik, Verlinde, R&M, Morris Crane Systems and Donati. The business area Service provides maintenance services and spare parts not only to products made by Konecranes but also to the cranes of other manufacturers The Business Area Port Solutions provides container handling equipment, harbor cranes for other types of cargo, shipyard handling equipment and heavy-duty lift trucks as well as services for these. (Konecranes 2018b)

The Business Area Industrial Equipment consists of different business units. The business unit Industrial Cranes manufactures, distributes and sells cranes under brands Konecranes and Demag (Konecranes 2018d).

5.2 Current buyer journey and sales funnel

The first stage of the Konecranes buyer journey is awareness. Marketing attracts general audience and creates interest. The next phase is consideration. First, the need of a stranger, which becomes a lead is born. Sales generates the lead and marketing provides information to guide the customer and introduces the offering. Customer, now becoming a prospect and therefore an opportunity specifies the need and sales determines it. Marketing encourages downloads and converts the customer. Customer discusses different alternatives and sales builds a solution for it. Marketing proposes and educates about the offering. (Konecranes 2017b)

The next stage is decision. The prospect selects the solution and supplier and sales ensures preference and submits the offer while marketing builds trust on Konecranes. The prospect makes the decision becoming a customer. Sales closes the sale and books the order and marketing delights the customer. In the last stage, retention and advocacy, marketing rewards and nurtures customers with after marketing to turn the customer into a promoter. (Konecranes 2017b) Figure 8 illustrates Konecranes sales funnel in the sales process of industrial cranes.

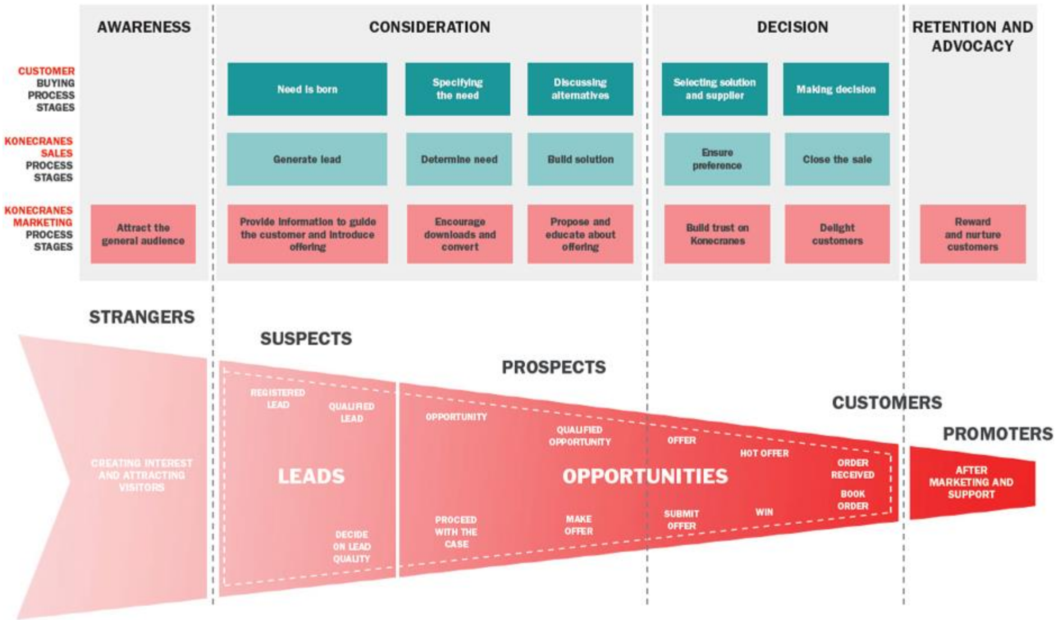

Figure 8. Konecranes industrial cranes sales funnel (Konecranes 2017b).

There is also another way to describe the actions of a customer along the journey. First, in the awareness stage, the customer has no specific interest. When moving to the consideration stage, the customer shows initial interest on Konecranes and/or its products. Next, the interest grows and a need is born. Then, the initial interest grows to focused attention on a specific product. In the decision stage, the decision starts to take form and then it is made. In the retention and advocacy stage the relationship has to be nurtured. (Konecranes 2017b) The following figure 9 illustrates this customer journey.

Figure 9. Konecranes industrial cranes customer journey. Adapted from Konecranes 2017b.

As it can be seen, the division of work between sales and marketing in Konecranes does not follow the traditional sales funnel presented by Kotler et al. (2006) There is no handoff from sales to marketing as marketing is involved throughout the customer journey. In the traditional funnel, sales takes care of the lead in purchase intention part (Kotler et al. 2006) but in the journey of Konecranes the sales is involved already in the consideration part.

There is a conflict in terminologies related to marketing automation and Konecranes sales process which must be noted. In marketing automation, a lead means a person. In Konecranes sales process, a lead means a business opportunity. This may cause confusion among salespeople. It also determines how marketing automation contacts are handled in CRM. It was suggested in the workshop that the word lead should be avoided in the context of marketing automation and use the term contact instead and that marketing automation leads are entered as contacts in Siebel.

5.3 Previous marketing automation experience

In 2015, Konecranes conducted a proof of concept (PoC) of marketing automation. The experiences with the campaign were not very promising as only a couple of percent of 50 000 contacts the campaigns were targeted for converted. In addition, the tool of the PoC was difficult to use and the workload and expenses compared to results were not very good.

One reason for the stop of the implementation project at that point was that Konecranes and US company Terex Corporation started to negotiate on company restructuring. Terex was using Pardot in some of its businesses so it made no sense to continue the implementation project a separate marketing automation tool at that point. In January 2017, Konecranes acquired the material handling and port solutions businesses of Terex. and the use of Pardot was discontinued in the acquired business.

Some people in the marketing automation reference group have been using marketing automation in the 2015 PoC, some when working for Terex and some when working elsewhere and therefore there is existing experience on marketing automation in the company. Due to the results of 2015 PoC, there might be change resistance among the people who participated in it.

5.4 Marketing automation targets

One of the reasons for Konecranes to implement marketing automation is to ensure GDPR compliance in customer data. Currently there are various email campaigns going on globally and data needed for them is stored here and there. With marketing automation, customer data will be stored in one place and email marketing can be continued with the tool. Having centralized contacts helps to fulfil data-related requests coming from the people data is about and helps to manage marketing consents of the users. All contact details in the system available for marketing communications are GDPR compliant. It is also easier to have one GDPR compliant tool than a large number of tools. It is ensured with an agreement with the system vendor that the tool meets GDPR requirements. However, it should be noted that the tool just facilitates GDPR compliant processes but it is up to employees if the requirements are met. Even though the tool is in place someone might for example send marketing emails manually outside of the tool to a contact who has opted out in the marketing automation system.

Marketing automation also helps Konecranes to centralize and harmonize other marketing processes in addition to email. Marketing automation also enables automatization of campaigns and creating marketing assets in a way that was not possible before. Data gathering enriches user data and enables more personalized content to be sent to the users. It makes lead nurturing type of email campaigns possible. Marketing automation makes it possible for Konecranes to run marketing processes in the most effective way. The tool also gives Konecranes the possibility to measure the effectiveness of marketing. According to the interviewed marketing manager, it is hard to determine what Konecranes wants to do with the system in the long-term, for example in five years.

The initial targets of the system are to ensure GDPR compliance, have all data in one place and get the system up and running. Once this step is done, further, specific targets are considered. These targets could include ROI or other ways to valuate marketing activities. Simpler measurements could be for example campaign specific email open rates or number of leads in the sales funnel. Lead scoring could also be utilized to indicate the overall readiness of leads to be targeted with sales activities and how they can proceed in the funnel. Konecranes is aiming to get more leads with the system so targets could be lead based and related to the engagement of existing customers. Each business area will have their own targets for what they want to achieve from the campaigns. There have been discussions with the implementation partner that there will be KPIs for the project.

GDPR compliance is targeted to be achieved internally by the last day of April 2018 so there will be some time to make final adjustments and have GDPR compliant processes in place before the legislation comes into force on 25th of May. It is targeted that by the end of 2018 there will be campaigns with other activities than just emails. The whole system with all its basic capabilities should be running globally at some point of 2019.

5.5 Tool capabilities

The system Konecranes selected is Act-On by an US company Act-On Software, Inc. The users of Act-On can be divided to marketing users and sales users. Marketing users have more or less full rights to the system. Sales users have visibility to the end of the funnel. They have access to reports and lead data of their own leads, for example lead activity. They can set alerts which are triggered if a certain lead score is passed. They can also send messages manually through Act-On. All messages sent by both the user and the tool are also visible in the history. Sales users cannot for example create campaigns as it is the task of marketing users. Sales users will have an individual link to access the data of their leads.

Accounts in Act-On can be divided into parent accounts and child accounts. Each company has a parent account. Child accounts can be purchased separately and they can be used for example with different brand. Konecranes has subscribed to only one parent account. This means that Konecranes can have five lead scores in total. Additional five can be requested from the company. Each child account would include five additional lead scores

Detailed history data in Act-On cannot be duplicated to Siebel which is the CRM used by Konecranes. It is possible to have one lead score, the default lead score of the company, visible in Siebel but that would not make any sense if the meaning of the number is not understood. Initially it is planned to have very light integration with Act-On and Siebel. Act-On does not support a native integration with Siebel.

The data about leads stays in Act-On despite of their transformation to Siebel. If the lead is too raw the sales process can be terminated in Siebel and nurturing can be continued in Act-On. However, there is no data flow to enable a direct return of the lead from sales back to marketing and all activities made by salespeople have to be added to Act-On manually. Such integration is not planned in near future but is seen essential to have only one harmonized database for lead data.

Act-On is capable for creating emails and distributing them automatically according to predefined workflows. These workflows can be replicated to other campaigns but replicating requires understanding what should and should not be replicated. Existing templates can be used in the tool. For example, an email can be sent to a certain segment and after seven days a new email is sent for those who have opened it and another kind of email to those who have not. The brand in these emails can be changed. Progressive profiling is also part of these workflows. There are also hidden fields in the forms if the data is sent to two places. The form can be replicated so that one copy goes forward to its destination and one stays in Act-On. The fields in forms can also adjust depending on what has been filled to earlier fields. Forms are automatically adjusted for mobile users.

Act-On is capable to guess the employer of the user by IP address or internet service provider. However, the only reliable enough way to identify the user is through active data gathering. In Act-On, active data gathering is either done by having the user to fill contact details in a form to access gated content or recognize when a user clicks a link in an email which is known to be sent to him or her.

In addition to emails, such marketing assets as landing pages, social media posts and webinars can be created with the system. Act-On Software has given a best practice to create landing pages, they should contain compelling offer, fine-tuned copy, simple value proposition, strong call to action, streamlined design and optimization for mobile. Content can be replicated to other campaigns if needed and suitable.

There is a possibility to connect Konecranes webinar tools to Act-On but this integration will not be done in the beginning. The system is capable to measure traffic on the website as well as basic indicators of emails such as bounce rates and open rates. There are own analytics features in the software and it is possible to connect the tool to Google Analytics.

On the company website, there will be an Act-On feature called beacon. It tracks people behavior on the website after they have had some kind of integration with Act-On generated content or otherwise navigated to the website. The first kind of people can be identified based on where they do come from whereas the latter ones are grouped as unknown contacts. This behavior data is used when determining lead scores and segmentation. It also shows what kind of content is working and what is not. The data can be used to build more detailed user journeys and paths.

A/B testing can be automatized in Act-On meaning that the software itself is capable of making the decision to use the best performing marketing assets. Act-On can also be used for search engine optimization (SEO). After a keyword is determined, the tool gives a website a score on scale 0-100 based on SEO recommendations by Google. The score is divided into different components and with these the system tells which components are doing well, which need improvement and which are so critical that they must be fixed immediately. The recommendations are detailed, for example the system can tell to add the keyword in question to specific spots on the site.

At the moment, it is not planned to connect Act-On with display advertising. It could be possible to do it with Google Analytics. To get the benefits of marketing automation, the individual viewers and clickers of advertisements have to be tracked and this might be illegal due to GDPR, at least if users are not notified about this. There are also other features in the software which Konecranes might never need.

There is a possibility to subscribe to additional features of Act-On in addition to those which are included in the base package. If needed, add-ons can also be removed from the solution. The social media features of Act-On are one of these add-ons. Konecranes has not purchased the add-on and is planning the continue to use the existing social media tool as the initial priority is to ensure GDPR compliance and employee resources are limited. However, the final decision has not yet been made. The social media features as well as other additional features can be introduced in later stage when the base package is running based on needs arising in the future. At the moment, even the base package has more features than Konecranes is likely to need initially.

Act-On is also offering beta versions of upcoming features. It is uncertain whether it is possible that Act-On creates customized features just for Konecranes as according to digital marketing and communications manager interviewed, Konecranes is not very significant client for the company. It is also a bit risky to have customized solutions as they might bring only short-term benefits and on the long term become useless. On the other hand, the interviewed marketing manager saw that as Act-On is a smaller player in the market Konecranes has an opportunity to influence the tool development roadmap.

Act-On Software defines it as a best practice not to send emails to recipients too often. There is a possibility to restrict the frequencies in automated workflows globally. The emails sent manually by salespeople can be restricted creating a segment for contacts that should not be sent emails as Act-On will then block manual emails sent to this segment. Another best practice related to emails is to have a sender address, compelling subject, summary of the content, short copy in the content and a clear call to action in the email.

5.6 Planned processes

The tool will be used for both customer acquisition and retention. This will happen across business areas as for example services are sold for customers of new equipment. It has to be taken into account that one customer can be inside the funnels of multiple business areas and in different stages. A customer that has recently purchased a crane is in the end of Industrial Equipment funnel but only at the initial stages of Service funnel.

Konecranes will have certain things shared such as best practices and ways to set up certain campaigns as well as some metrics. There will possibly be a certain central framework setting the stone. Business areas and regional units have certain freedom to adjust the marketing to meet their specific needs. In Konecranes, the offerings, selling processes and buying personas of different business areas vary a lot from each other so such is needed.

Konecranes has planned to have approximately ten marketing users and 50 sales users for the system. There are from one to two marketing users in each business area and probably some from some countries or at least regions. Sales users might be for example sales managers. These users will use marketing automation in addition to their existing tasks.

It is not yet determined who the users will be and this determination is done in business areas and business units. It is aimed that marketing people using the system have previous experience on marketing automation either from Konecranes or a previous employer. They will nominate the salespeople who they think are suitable to use the system to ensure the alignment between marketing and sales in the best possible way. The interviewed marketing manager sees the alignment as a challenge.

The tool will be rolled to those geographical areas where email marketing is already in use to ensure the GDPR compliance of email marketing. The launch will be phased so that not everyone is going to do email marketing with the tool from the beginning. Campaigns taking place in the second quarter of 2018 will be prioritized. Everyone using the system should be onboarded by the end of 2018.

The phased implementation means on a broader point of view that not everything is implemented from the beginning but that implementation is carefully planned and conducted step by step. First steps will be building processes, frameworks and standards. It is important that these are done together so that the same things are not done in different ways in different parts of the company. To ensure successful implementation customer personas, content, alignment of content and personas have to be determined carefully as well as lead scoring and metrics Both Act-On Software and an implementation partner will help in the integration process.

It is easy to add additional users to the tool but the subscription fee of Act-On is based on the number of users and amount of contacts in the database. This limits the number of users. Once the system use has passed the initial phase, Konecranes can broaden the user base by investing to more users based on the business needs.

It is possible to add also other users than marketing and sales users to Act-On in case such is needed. These kinds of users could be representatives of the external implementation partners and analytics users. The need for example analytics users would be determined on business area level.

The users will be trained internally to understand marketing automation, roles of sales and marketing in its processes and to use Act-On efficiently and flexibility. The current knowledge of marketing automation varies a lot in the company.

Initially it is not planned to build a separate marketing automation team inside the company or have dedicated people running the system. The system will be administrated by the two marketing managers interviewed. They are in charge of system management, practical use of it and relationships with the vendor. They are reporting to Vice President of marketing and communications who has in a way senior management role. The IT has the ownership of the tool. There will be a marketing automation steering group which consists of relevant stakeholders. Decisions such as what is done when and how are made in this group. It is seen as a challenge by the marketing manager that there are no dedicated people working with the system. It might be that a need for such arises naturally and in that case some people might be dedicated to system use. It can also be that people with various tasks just start to spend more time with the system.

There will be a forum in which marketing automation users can discuss about campaign results and best practices for example by sharing their findings or asking for advice. All campaign results will be stored in the system but giving access for them for all marketing users would mean giving access to all customer data. Therefore, having a forum is seen to be a better option. It also helps to discuss about the results instead of just reviewing them.

Act-On does not have a feature to alert a salesperson if he or she has not contacted a new lead within a preset time frame. This lack of feature can be overcome in weekly meetings of sales teams in which sales managers notify salespeople about such situations. This kind of meetings are already a part of Konecranes sales processes.

It is estimated that there will be around 200 000 contacts in Act-On. It is also estimated that the data will be bad in quality. The current amount of data about to go to the system is larger but all contacts will be checked with Neverbounce to remove those contacts that are not valid anymore. Also, in Siebel there are currently hundreds of thousands of contacts.

It is not yet decided how contact details will be segmented in the system. Possible bases for segmentation are for example business areas, product categories and geographical areas. The way of segmentation must be decided and carefully determined beforehand as it determines how folders are organized inside Act-On. Once the folder structure is set, it is very hard to be altered. The company will either have one lead score or there will be multiple of them, for example at least one for each business area. If only one lead score is used, the limitations this sets are overcome with segmenting. Like lead scoring, segmenting is also a complicated process that will not go right in the first try and requires changing over time.

The business unit Industrial Cranes is developing personas for different participants in the buying process. These will be used when targeting marketing messages to ensure that a right message reaches right people.

The contact details will be about individual people. This means that there might be multiple contact details from one company. There should be a process to ensure that all communication to one company is harmonized and suitable to the stage in sales funnel and how long the company has been a customer.

5.7 Current and upcoming IT landscape

Currently Konecranes has more than 50 different applications where customer data is stored. The amount of applications will be reduced significantly as multiple applications will be replaced with marketing automation.

There will be one centralized repository for customer master data, CRM. Each brand will have their own master data. CRM data contains information about contacts and interactions with Konecranes. However, behavioral data about customers will be stored in marketing automation system. In the IT landscape proposition marketing automation will be an independent system, not a part of CRM. (Konecranes 2017a)

There are numerous applications which require data flow with marketing automation. Data about leads and campaign information flows from marketing automation to CRM and contact data flows to the opposite direction. Behavioral data flows from Konecranes website, eCommerce and customer extranet yourKonecranes to automation system and trigger actions based on behavior moves to these applications. Data about marketing campaigns and behavior flow from automation to data warehouse and data about target groups flows to the opposite direction. Data to build target groups inside data warehouse comes from multiple sources and is combined inside the warehouse. (Konecranes 2017a) Data flows are illustrated in figure 10.

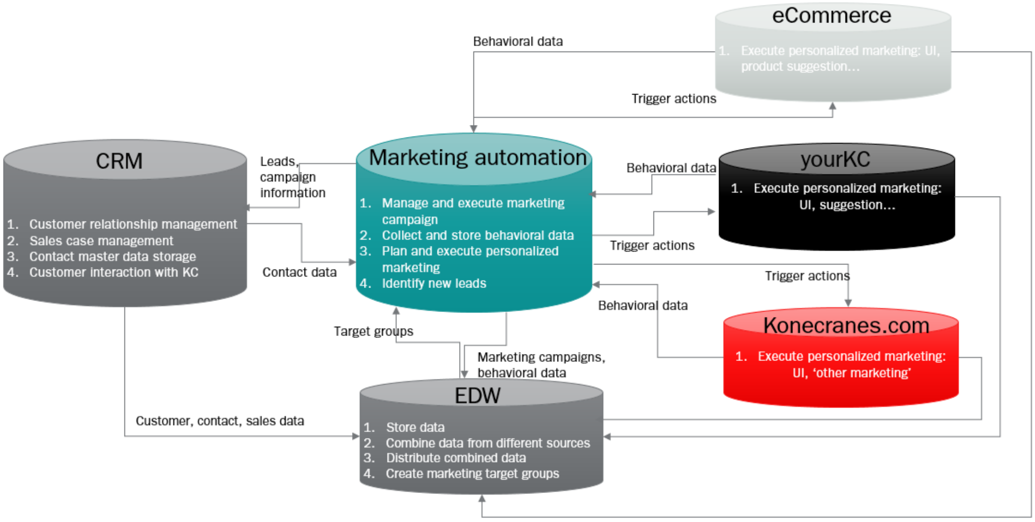

Figure 10. Data flows around marketing automation. (Konecranes 2017b).

The following figure 11 illustrates the marketing automation process in IT landscape in a more detailed way. It shows what is done with which tool and how the tools are related to each other in the process. It was proposed in the workshop that there will be a status in a Siebel contact to show that the contact is in a nurturing program. When the nurturing begins and ends, Act-On changes the status.

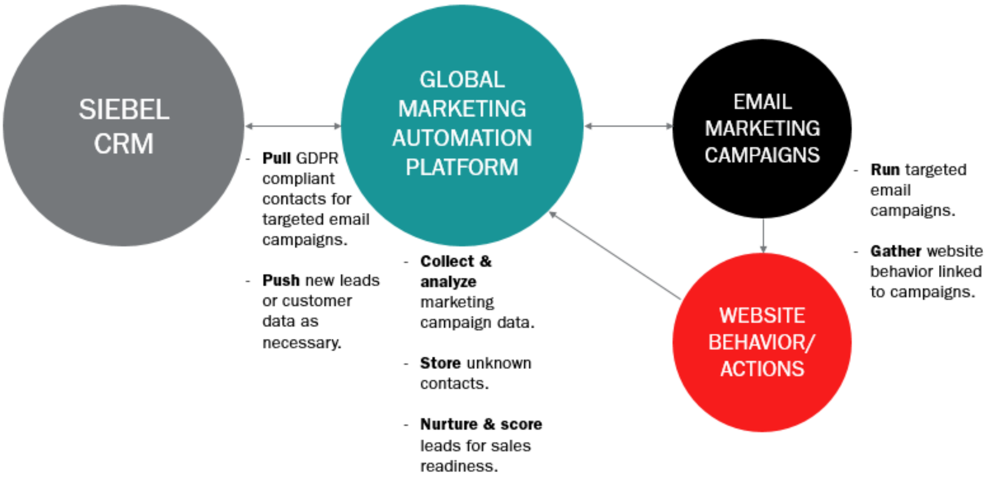

Figure 11. Marketing automation processes in IT landscape. (Konecranes 2018e).

Marketing automation will also be integrated with tracking infrastructure, dashboards and Google Analytics. There will be a direct marketing unsubscription form and GDPR data request form created with Drupal which means that also Drupal has to be integrated with Act-On.

In the future, if social media is included in the tool, it will be integrated to Act-On as well as other relevant features. Act-On has an existing API to link various tools such as business intelligence or webinar tools from major providers to the tool. Act-On can also be used in other parts of the businesses such as eCommerce. This would require integration of Act-On and eCommerce as illustrated in figure 10.

6 MARKETING AUTOMATION EXPERIENCES

This section describes experiences regarding marketing automation in interviewed external companies. Themes implementation of marketing automation, requirements for organization, use and processes of the tool, best practices, roles and responsibilities in implementation and use, IT landscape, encountered challenges, metrics for success, GDPR compliances and changes in use are featured. This data is collected by interviewing representatives from companies as listed in table 5. Data is categorized according to themes mentioned previously and combined into consistent entity based on these themes.

6.1 Implementation

The reasons why the interviewed companies have adopted marketing automation vary but are similar to each other. Kemppi saw marketing automation implementation as recent trend and did the implementation when a new CRM system was set up, Wärtsilä saw it as a reasonable next step to take, KONE wanted to catch up with latest marketing activities, ensure competitiveness, increase awareness and increase conversion rates with digital marketing. Outotec saw need for modern marketing practices and decided to implement the system at the same time with CRM modernization.

The clients of Mirum and Avaus have implemented marketing automation because it brings measurability to marketing, better efficiency and better sales results. Some do the implementation proactively when hearing positive stories and some reactively as they have not been in the forefront and are now in a way forced to do it. The implementation usually takes place during a larger IT project, such as a CRM update.

The length of implementation processes has varied a lot. Some of them are complete in a couple of months whereas some took more than a year. According to Kemppi, KONE and Mirum interviewees, the implementation process can never be ready. There will always be some new features that will be developed and added to the system. Avaus interviewee noted also that implementation is only a small step in the overall use, the system requires constant development.

Kemppi began the process by building a strategy. Customer journey was used as a part of the process definition. The tool was integrated to IT landscape and existing newsletter world.

Wärtsilä had three key targets for implementation which were integration with CRM, integration with content management system and capability to obtain actual prospect data. Content was created on the fly. Sales was not involved and their view was not heard, which was seen as a mistake by the Wärtsilä representative. Some of Wärtsilä's business divisions adopted the system faster than others. After a couple of years Wärtsilä decided to change the system and in this migration process it had a roadmap containing for example which assets need to be migrated where, how the governance will be structured, how the tracking will be migrated and how the new system will be integrated to IT landscape.

KONE started their implementation by aligning with sales. KONE did not have any kind of roadmap. During the course of implementation, businesses were asked to determine their needs and after that to create content suitable for those needs and needs of marketing automation. Legal department was consulted to ensure legal compliance in data handling. Global campaigns, contents and technical solutions were created and after that the initial launch of marketing automation was made. Next the system will be scaled to countries the company is operating. Sales is involved in the implementation for example by defining criteria for marketing and sales qualified leads.

The implementation of marketing automation in Outotec was strongly linked to CRM implementation. It included email and template specification and establishment of functionalities and a subscription center. These tasks were also the content of implementation roadmap. Both marketing and sales employees were trained to use the system. The training of marketers was done by an implementation partner and the head of marketing gave a brief training to salespeople to point out why sales should be interested in the system.

Mirum interviewee sees that having a roadmap is critical for a successful implementation. It keeps the project on the track and helps to meet the requirements the system sets. The roadmap consists of milestones set for different basic functionalities. Before these milestones there are so-called project gates as decision-making points. These set the track for the latter process. For example, one project gate can be a decision whether the marketing automation is integrated to CRM or not and data handling will be characterized by this decision.

Outotec interviewee recommended that subscription center, subscription management and management of opt-in data should be planned carefully in the implementation phase as they create base for everything that will follow if they are developed well and in a way that supports business. They should be based on customer segments and customer needs instead of business or organizational structure as this is more sustainable.

Mirum interviewee highly recommended having sales to participate in the implementation process. They in a way participate in setting targets. This way they understand better how the tool benefits them. Sales also gives important inputs to customer data. Avaus interviewee stated that sales should always be involved in the implementation.

6.2 Requirements

According to Kemppi interviewee, it is vital to do cooperation and onboard salespeople and those who are in responsibility for sales. The most important requirement according to KONE interviewee is to align with sales so also sales understands what is going on and how leads coming from marketing should be handled. Definitions of marketing leads and marketing qualified leads (MQLs) should be decided together as well as what is wanted to be achieved with the nurturing process. Other parts of buyer journeys back and forth in the sales and marketing funnels must be determined as well and technical solutions enabling these have to be in place. According to Outotec representative, there has to be a deep relationship between marketing and sales to exploit the full potential of the system. In practice, this means commons goals and agreement of in which kind of situation the lead is when it is handed from marketing to sales. Marketing should also take advantage of the customer knowledge of the salespeople gathered from the field when implementing processes.

According to Kemppi representative, the executive board has to be in favor of the system. Management should have an understanding that money, resources and diverse talents are needed to run the system properly. Also those deciding about budgeting have to understand the need of money. The use of marketing automation consumes a lot more money, time and resources than the implementation. The system needs content constantly to keep running. The amount of work may come as a surprise.

According to Kemppi interviewee, there has to be one enthusiastic person in the organization to drive forward the implementation of a new system. Outotec representative stated that one champion is needed inside the company to support system use. External technical support is needed if there is no internal competence. Avaus interviewee states that there should be a person in the organization who approximately understands what marketing automation is all about and can hire either right kind of people or right kind of partners.

According to Kemppi representative, there should be an internal service organization which helps everyone all over the company to use marketing automation in their promotion. The system vendor should also participate in this support. There has to be various kind of marketers working with the system. Some should be able to produce content, some display marketing and retargeting. They can work in the organization or for a partner. Thought leaders are needed to share content across various platforms to generate traffic to the website.

Kemppi interviewee highlights the fact that marketing automation is only a tool and revenues generated with it are completely dependent on the actions done with it after the implementation of the system.

Wärtsilä interviewee noted two kinds of requirements. One is related to the way the CRM system is used such as what is the status of incoming contacts in CRM, when they will be assigned, how does the conversion work and how reporting is done. The other kind of requirements are organizational, meaning how it is and is not allowed to handle the data per company policies, for example who has access to data and how it is stored.

When it comes to organizational changes, Wärtsilä was not forced to do them but they ended up happening naturally. When new people were hired to vacated positions, they had prior knowledge of marketing automation and more modern and data-focused approach on marketing. KONE interviewee told that there has been organizational changes but was unable to disclose them in more detail. On a general level, digital marketing skills are required in the organization. In sales a person is needed to handle and qualify the leads. According to Outotec interviewee, the organizational changes depend on the utilization of digital channels and the tasks for example field marketers and business unit marketers are performing.

Mirum clients have for instance established new teams to operate marketing automation system. Sometimes a completely new function has been established and new people have been hired to that. Some changes are made to make the marketing automation compatible with other systems. Quite often processes are altered and renewed significantly.

According to Avaus interviewee, B2B organizations tend not to do organizational changes proactively but to pilot a tool with their existing organizations and only after a successful implementation do changes. For example, a separate digital team or growth team might be established inside marketing or that there will be a Chief Growth Officer who works with people who are specialists with many tools and channels and know how to for example generate traffic and reap sales from this traffic.

A change of mindset was required in KONE as marketing became more data oriented and opinions and assumptions lost their value. There is a change in the role of marketer and required skills as well. Creativity is not needed anymore; nowadays structural and analytical thinking is needed as well as ability to learn quickly.

Ototec interviewee pointed out a similar needed cultural change which is to understand that marketing automation will always teach something new about the client base. After the implementation, campaigns are created iteratively and the new knowledge about customer base is exploited. The results of the campaign cannot be known beforehand. There can be predictions and hypotheses but they might be wrong. Management should support such culture that people are allowed and not afraid to try and learn.

According to Avaus interviewee, in addition to realizing the benefits of the system sales has to understand the new role of marketing as a helper rather than brochure creator and to ensure that all data about customers will be added to CRM to ensure measurability. Also, sales management must become more systematic and scientific.

According to Outotec interviewee, marketing automation requires new kind of content. The content should be divided in pieces. Users do not want to read long stories or watch long videos but there is no problem in consuming shorter pieces of content or summaries. Content should also be recyclable so that for example parts of a technical conference paper is redistributed as a part of digital marketing.

6.3 Use and processes

Kemppi uses marketing automation for lead nurturing. In each part of the customer journey there are certain predefined actions that the marketing automation conducts. Lot of emphasis is put on first stages of the journey as a large portion of the decision making of the customer is done before the first contact to Kemppi. The gathered data is exploited by salespeople prior their visits to the prospects. KONE is using marketing automation in automated nurturing campaigns which consist of for example emails and websites.

Kemppi has to take into account in all marketing and communications that it is using a multichannel approach. All actions in different channels such as website and social media must be planned. Kemppi has a roadmap also for marketing automation campaigns, a detailed plan on a weekly, even daily level of what marketing actions are taken at which point of time. There is also general plan on the cycle of how often nurturing pipes are developed.

Kemppi is monitoring the usage of their websites, such as where do the visitors come from and which kind of information about which products do they browse. This information is utilized when creating promotion. The system is capable to tag clicks to determine which is the original source of the user, such as a search engine or social media publication which led to Kemppi website. This helps to monitor which channels and messages work the best way with each target group and market area. The channels and touchpoints of the customer journey and information in each point are also improved with user surveys.

Wärtsilä has three different ways to use the system. The first one is basic outbound marketing. A certain message aiming for certain kind of activity by the recipient is sent to a certain audience by email. A bit more in-depth process is an engagement program which is targeted to for example a certain area, region, product or business line. This program lasts from three to six months and includes lead nurturing with different kinds of marketing materials such as opening email, webinars and downloadable content. Lead nurturing aims to a situation that the person can be handed to sales as an opportunity. Another process is inbound marketing. Wärtsilä uses a 3rd party tool to make sure that people who are a part of a desired target group end up to Wärtsilä site through an ad network. If they download something of fill in a form certain predefined actions are triggered.

Wärtsilä is using the system with channels such as website, emails, webinars and social media, both paid and organic. Event registrations are also handled with the platform. All marketing material is A/B tested with the program. There might be up to five or six alternatives which are run through the testing. Wärtsilä steers also buyer journey by comparing the person to customers with similar demographics or similar tracks. Based on this pattern analysis the next steps of the journey are decided. Wärtsilä is aiming to have a unified lead process for sales and marketing across the whole company. At the moment, the process is like a traditional marketing and sales process in which marketing takes care of the first parts of the funnel and sales the latter. However, marketing is also supporting sales in the certain stages of sales.

KONE is using marketing automation in automated nurturing campaigns which consist of for example emails and websites. The campaigns are structured based on REANS (reach, engage, activate, nurture, sell) model. Some ways to conduct the first stages of the models are paid social media marketing, paid search engine marketing and search engine optimization. KONE is also using marketing automation for some A/B testing but not much.

In Outotec, currently only a small amount of the tool use is product marketing, marketing is related more to selling solutions and expertise. Outotec interviewee provided concrete examples of the system usage. The clients can do value calculations of modernization projects of certain products in Outotec website. This information is collected to the marketing automation tool. Event invitations are also sent through the system. In such case a target group is gathered by marketing with the help of sales. An automated invitation program with two to three touchpoints is performed. In addition to contacts by the system salespeople might also manually contact the targets. There might be a landing page or a microsite to provide the guests with content such as agenda. Such content is also directly only sent to those who have registered already. They might be provided for example with practical information about the event.

Before the campaigns Outotec marketers have a briefing to determine the targets and purposes of the campaigns. After the campaign, there is debriefing in which external and internal feedback is went through to determine what can be learnt and what can be altered or improved in the future. Campaigns are usually developed in cooperation with marketing, sales and product managers. With their tool, Outotec can replicate the workflows for new campaigns. However, one should be careful that the duplicated content is changed before the campaign is executed. The processes inside for example different business units are the same and only content is different.

Kemppi is using lead nurturing for both customer acquisition and retention. In Wärtsilä, the system is also used for both customer acquisition and customer retention. Customer retention is done by the division Services which works only with existing customers and tries to maximize their lifecycle value. There are differences in how a customer is positioned in the funnels of different divisions. A customer which has recently purchased a marine engine or a power plant is in the late stage of the funnel of this division but in the early part of the funnel of the Services division.

Also KONE is using marketing automation for both customer acquisition and customer retention. Due to the nature of the business this applies both to new equipment and service business. KONE is also targeting their marketing to different participants in the buying process, not only decision makers. For example, it can be that the construction company makes the actual purchase decision but the decision is based on the plans of the architect who has designed the building. End users are also targets of marketing activities. Due to the industry in which Outotec is operating by far the largest amount of the system use is related to customer retention. New products, modernizations and services are targeted for existing clients.

Mirum clients use marketing automation to both customer acquisition and retention main task being customer acquisition by lead generation. Customer retention is customer relationship development by having a dialogue. This dialogue has to be planned. Such things as how and when to contact customers in different scenarios such as after a long silent period or closing a large deal as well as when not to contact customers should be considered.

KONE is using the product interest of the customer as well as country of origin as bases for segmentation. Different marketing messages in different languages are sent into these segments. Outotec is targeting everyone in the target group of the campaign with the same message. In the future, the content will be customized to meet the preferences of individual targets better. In theory, it would be possible to adjust the timing of promotion but right now it is done manually be the sales team handling the case.

Kemppi has defined the lead scoring together with sales. Once the lead moves to sales, the salesperson has to do a manual final qualification before it becomes sales qualified lead and is moved into CRM. Kemppi had to update its lead scoring to improve the quality of leads as the salespeople were getting too raw leads. Instead of having one lead score, Wärtsilä has in total around 15 different scores for each business division and for some business lines.

In Kemppi, salespeople have visibility to actions taken by a lead but only after the lead has identified him-/herself. The salesperson does not need to have any understanding of the actual marketing automation system. In Wärtsilä, the sales sees the score but does not know what to do with it. According to Wärtsilä, the score should be irrelevant for sales in a way. It should indicate them the priority of leads in terms of contacting them but this is not currently the case, at least not yet.

In addition to traditional lead scoring based on for example website activity or downloads, Kemppi has also has so-called express tracks which are taken into use after certain actions by the prospect such as requesting a proposal or a demonstration indicate strong interest towards a product

Mirum clients have already had lead scoring and nurturing in place but in a very simple way. Downloading a certain document has made a user a lead and monthly emails are sent to leads. With marketing automation, these processes start to get more attention and more emphasis is put on them. Mirum interviewee sees lead scoring as a constant process. If needed, also negative scoring should be introduced. For example, no actions in a long period of time by the lead may result a lower score.

KONE is not using any kind of lead scoring. Instead of scoring, there are two types of forms and by filling those the user gets access to gated content. The first one asks the name and email of the users as well as consent for direct marketing. When this form is filled and sent, the user becomes a marketing lead and a certain nurturing campaign related to the product in question starts. There is also a form asking all relevant information to generate a lead in CRM and once the customer is ready to provide them the user becomes a sales lead by filling the latter form. The aim of marketing automation is to have users to fill in this contact request form or otherwise contact KONE or request for example a demo. KONE ranks the leads inside CRM by categorizing them as cold, warm or hot.

Outotec has a similar process in place as KONE. It is seen difficult by Outotec representative to have lead scoring system in place in a global company with multiple business units, business lines and product lines. Instead of lead scoring the company provides many contact possibilities and activates if a contact is made. There are certain one point activations causing contact, such as downloading certain material. If the contact request is made at a specific point, it means that the lead is willing to have a contact from the sales and therefore ready for it without any further nurturing.

All companies do the identification of leads through active identification as passive identification is not reliable and accurate enough. Passive identification tells only the company the user is working for or it might show just the internet service provider. Most of the companies do active identification with forms. Outotec also uses email click-throughs for that. Wärtsilä is using passive identification in customer clustering and when preparing for sales meetings but the latter only in a case that the company already has a salesperson assigned to the company in question. KONE identifies the type of the user by asking it directly and if an answer is provided, the website will be tailored to provide information targeted for the user type, for example architect or builder. Mirum clients do data gathering in both passive and active ways. Sales also participates in the data gathering for example by putting data about contacts to customers to the system. Active gathering is done progressively.

All of the companies are using gated content to get users to fill in forms. Kemppi and Wärtsilä are using progressive profiling with five to seven forms. KONE and Outotec have only two forms, one being very simple and one asking all required details for a lead to be created to CRM.

According to Mirum interviewee, it is hard to said accurately to how many parts a form should be divided but this can be determined by trial. As a rule of thumb, one additional field in a part of the form lowers the conversion rate by five percent. The interviewee pointed out that filling the complete form over a long period of time itself indicates engagement by the user whereas filling the same form at once tells nothing.

KONE interviewee sees the future of marketing automation so that in a couple of years the tools are capable to do not only A/B testing but also lead scoring completely automatically. This is one reason why KONE is not customizing their marketing automation tool to support lead scoring as the feature might be coming up in a completely new form. She also stated that IoT fill bring new possibilities to marketing automation but does not see KONE adapting them.

6.4 Roles and Responsibilities

In Kemppi, at the beginning of the implementation, one employee was nominated as digital community manager. He was trained to understand marketing automation thoroughly by the system implementer. In the implementation, he was responsible for everything. In the usage phase, his task was to make sure that each of the software linked to the marketing automation is developing as they should be. The marketing manager is in charge of content and content paths to ensure that they are strategically correct. One person is responsible for producing bigger entities of marketing communications material such as blog posts according to strategy and one person creates newsletters and uses social media. One of them is also in contact with external marketing partners.

The marketing automation manager in Wärtsilä is responsible for both the use and administration of the system. He approves the activities of regional marketers before they are taken. He is also the direct contact person in any marketing automation related issues. There are four different kinds of users in the marketing automation system. Sales users have access to everything but they cannot do any marketing. Marketing users have edit access to marketing of their own divisions. A couple of key users have view access to everything and they have more edit rights than marketing. Two admins have full access to everything. Different divisions have different approaches to the roles. One division trains users and gives then access to the systems and those people can be basically anyone whereas the other two do not want to give access to anyone. In total, there are approximately 70 users.

In KONE, the email and marketing automation specialist in charge of the entire system and currently its administrator. Administration will be switched to a support vendor who will take care of all CRM related applications. An external agency is the solution design owner of the tool but the KONE interviewee sees that due to her role in the company, she should be the solution design owner.

Only in Outotec marketing automation is considered as a part of CRM and therefore the business owner, concept owner and service manager of CRM are also in charge of marketing automation. They are the administrators of the tool. Marketing has a role in system use and capabilities as well.

Mirum interviewee suggests having the ownership of marketing automation in marketing. A system administrator granting user rights and ensuring data flows during the integration usually comes from the IT.

In Avaus clients, a Chief Marketing Officer or a Vice President of marketing usually has the overall responsibility of the system. In some cases, sales development, IT people or Chief Information Officer or Chief Technology Officer has a part of the responsibility. Avaus interviewee states that there should be one key user in the system who has admin rights and a broader understanding of the system. IT organization should have a strong role. Both IT and sales should understand the system possibilities and if this understanding leads them to ask for a bigger role, it should be given to them. Some clients have a larger organization consisting of marketing operations, analytics and sales development around the marketing automation and this is led by a Chief Revenue Officer.

In Kemppi, marketing and sales are doing seamless cooperation all the time. Cooperation with local marketing teams and customer service team is also needed. In Wärtsilä, marketing has taken more role. When a salesperson requests marketing content, the marketing person might point out that according to the data provided by the system there are better possibilities to grab and higher priority should be given to them. Marketing nowadays also observes that sales is taking action on the leads provided by marketing. If the lead is too raw, sales has to return it to marketing and tell them to nurture it more.

Kemppi has coordinated marketing and communications activities steered from the headquarters (HQ) and this applies also to the use of marketing automation. Local marketing teams localize marketing designed by the HQ, for example by translating them to local language. They can also set up local campaigns if needed and get help from HQ to for example marketing automation usage if needed.

In Wärtsilä, there is a competence center which is focusing on developing marketing automation as a whole. It is not under any of the business divisions. There are only global processes, no local differentiations. Marketing materials and campaigns are however localized based on the needs of the target market. Campaigns are designed in the HQ and implemented by local marketing teams. If there is a significant business case a person from the HQ starts to coordinate the local team of the area.

KONE is managing campaigns from a global marketing team. The basic outlines for campaigns are set by this team. Content is created by business line marketing teams. Local teams are responsible for their communications and they localize global content by translating it and making it to fit local market offering. The global team supports locals if needed. KONE has separated digital marketing and content creation. Approximately two marketing users in each of 40 country units are using the tool but the activity of the use varies a lot. Salespeople do not have access to the marketing automation tool.

In Outotec, there are globally 15 marketing people using the system in addition to their other duties. Everyone is responsible for the part they are doing. The company has the champion supporting the marketers. Also, the marketers share knowledge as the level of their skills vary depending on how much they have used the system. These local people in Outotec have quite free hands to do local campaigns based on their needs. Some more advanced campaigns are globally standardized to get economies of scale and the only localization done is to translate the content. There are basically no sales users in the Outotec system. Salespeople have capabilities to send emails via the system if they need a template which is in the tool. Data gathered by the marketing automation tool ends up in CRM but it is not yet exploited in a full scale. The head of marketing passes some information he might have noticed to account directors.

Some of Mirum clients operating globally have a central ownership for the system and only operating responsibilities are distributed globally. In some cases, also the ownerships are in local subsidiaries. Some clients have separate marketing automation tools in different regions. This is money-wise an inefficient way and makes the company to lose synergies. The basic users of the tool in Mirum client organizations are content producers who for example send emails, create web pages and write articles.

In many Avaus clients, there are usually content producers who work on content such as emails and landing pages. This requires narrower understanding of the system. The clients have also possibilities to create for example analyst users. Some clients have only a few system users globally and they have large workloads. Avaus interviewee states that in local subsidiaries, there should be at least one person who operates the system. Some of the clients have one key user per country. Some clients have established a global excellence center to serve local companies. For example, they create customer path programs which include for example emails, web sites and lead scoring. All the local companies have to do is to localize content. One common model within clients to conduct campaigns is REANS model. Each of these phases have metrics, which enable comparison between different countries.

Avaus interviewee stated that digital behavior of people is quite similar all over the world. Also KONE interviewee mentioned the similarity in the behavior of people in the different parts of the world.

During the first implementation, Wärstilä let the system supplier and implementation partner to do most of the work. During the second implementation, the company already had competence so the strategic parts of the implementation were decided and done in house. Integration to CRM was done by Wärtsilä but connections to other tools by an external supplier. Manual work such as replicating forms and emails was done by another supplier and query by another. In the use of the system Wärtsilä relies on three partners, some more than the others. One partner participates in strategic development and stack development and one in implementation of technical issues such as data floww. Some marketing activities are outsourced to the third partner if needed. The rest is done by Wärtsilä.

Kemppi has outsourced some production of marketing material as well as retargeting and A/B testing to external partners. Cooperation is basically decided case-by-case. Kemppi and external partners are in touch daily on small issues and weekly and monthly on bigger issues.

During the implementation KONE had an agency supporting them creating the automation flow and providing needed consulting. Nowadays technical support is also provided by the vendor.

The implementation partner of Outotec gives technical support for system administration and participates in its development but does not participate in the operational use in any way. In the implementation process it provided technical knowledge related to CRM integration and basic functionalities and trained Outotec marketing employees to use the system.

According to Mirum interviewee, IT should be in charge of the implementation process. Mirum participates in the process by providing consulting and help. In the beginning, they might also do all the marketing materials. The client then gradually takes over the tasks and learns to use the system. There might be a steering group guiding the implementation. Some clients outsource practically everything, even responsibility to Mirum. It is agreed who does what and when. The client might be responsible for small tasks.

When using the system, Mirum is all the time available for constant development and optimization. Some clients have outsourced bigger campaign-related tasks and some have outsourced individual tasks when they do not have capacity to perform them themselves. Mirum has also helped recruiting people responsible for marketing automation. In general clients have started to put emphasis on in-house knowledge.

Some Avaus clients have outsourced the complete marketing automation for Avaus. Some are doing tasks themselves and Avaus has an advisory role with them and helps them for example with difficult technical tasks such as integration. Content is usually done by customers especially in industrial companies because the material has to be specific and therefore the content producer has to have understanding of the industry. During the implementation Avaus has significant role in setting up the system. It is in general a common way of work that specialist companies are used in the implementation as they have previous experience of it.

6.5 Targets and metrics

Kemppi has KPIs for overall marketing performance instead of having something specific for marketing automation. One category of KPIs are sales leads coming through different digital channels. These KPIs have clear targets. Kemppi has also strategic targets to how many products are sold each year or month, how much there are direct sales and how much sales through marketing automation. These monetary KPIs are however sales KPIs, Kemppi does not have any marketing related monetary KPIs. One KPI is also how many likes each of the company’s Facebook pages has. The KPIs are annual figures.

There is a marketing dashboard in Kemppi CRM giving constant real-time information about the amount of marketing and sales leads and their sources, revenues generated through marketing automation, how many euros there are in proposal phase of the sales funnel brought by marketing automation and what are the revenues generated from deals which marketing automation has influenced.

In Wärtsilä, each business division has their own target for the amount of marketing qualified leads, how many of those are accepted and how many visitors do they touch annually. Each part of the marketing funnel has their own target. Wärtsilä has not yet final KPIs but these will be separate for each division and they will include for instance number of prospects, number of active prospects, number of marketing qualified leads and number of sales accepted leads. The success is reviewed quarterly. The only monetary KPI that is somehow related to marketing automation is the impact of marketing and sales to the baseline.

KONE is targeting for faster execution of marketing and more opportunities to sales funnel. KONE has KPIs for different parts of the funnel. These include the amount of new contacts, amount of impressions, open rate, click rate, engagement rate, amount of new leads and amount of leads that have converted into opportunities. KONE also has monetary KPIs for opportunities that end up in sales. However, KONE is not yet measuring ROI as they need to grow volumes in order to do it. Data is monitored real-time through CRM reports and the BI system.

At the moment Outotec is targeting to increase contact mass and the utilization rate of contacts. These two indicators are monitored. It is not yet relevant to monitor amount or quality of leads. Outotec has some campaign related KPIs such as click-through rate or increase in subscription base which are related to the campaign in question. KPIs can be even tracked to single emails. In Outotec, revenues related to sales can be tracked but it is hard to determine which touchpoint with the customer is the one that leads to closing the deal. Revenues of some service-related campaigns can be tracked but as there is no exact knowledge of costs it is hard to determine ROI.

In Outotec, the data provided by the automation tool is used to get quickly information about the results of a campaign. The overview is available in the BI tool and that is monitored weekly by the head of marketing. A group of marketers monitor some metrics monthly. The individuals are monitoring the metrics of their own activities and share interesting findings with others. There are no separate analysts or controllers concentrating in marketing.

Mirum has divided targets with their clients to smaller sub-targets which are achieved one by one by supporting actions. These actions have KPIs. For example, if a target is to double the sales and one way to achieve this is email marketing, an individual email might have a target to generate traffic to a website and in that case the KPI could be for example opening rate, click rate or amount of traffic. If the target is to create awareness a sub-target can be number of new users on a website and the KPI can be the increase of traffic to the website. Mirum has KPIs for its cooperation with clients and these are monitored constantly. Mirum interviewee prefers to have monetary figures as targets and something else as KPIs.

KPIs of Avaus clients have evolved over time. Usually at first the overall amount of leads is measured. After that the companies begin to measure marketing qualified leads and sales accepted leads. The next level is to measure how much marketing pipeline revenue marketing has created and what is the share in sales pipeline that marketing has been influencing. Avaus clients monitor mail opening rates, website visitors and lead generations on a weekly basis, overall lead generation and qualified lead generation on monthly basis and on quarterly basis the marketing impact on sales. According to Avaus interviewee, KPIs should be monetarily. This could for example include how much sales is generated, how much pipeline for sales is generated and what is the amount of marketing influence in the pipeline.

ROI is one KPI for Avaus clients. According to Avaus interviewee, to be able to measure ROI the company has to be able to define cost structure of activities related to marketing automation. Automation tools are capable to determine ROI if all data is available, otherwise it is very difficult to determine it. According to Mirum interviewee, ROI or a break-even point for a marketing action is easy to calculate but it is difficult to calculate ROI for the whole marketing automation investment.

The following table 6 summarizes the KPIs used in interviewed companies.

Table 6. Key performance indicators in interviewed companies.

Non-monetary	**Monetary**	**Company**
	Revenues generated	Kemppi, Avaus clients
	ROI	Avaus clients
Amount of new leads		KONE, Avaus clients
Amount of MQLs		Wärtsilä, Avaus clients
Amount of sales accepted leads		Wärtsilä, Kemppi, Avaus clients
Annual visitors		Wärtsilä
Number of prospects		Wärtsilä
Number of active prospects		Wärtsilä
Number of new contacts		KONE, Outotec
Open rate		KONE, Mirum clients, Avaus clients
Click-through rate		KONE, Outotec, Mirum clients
Engagement rate		KONE
Number of new opportunities		KONE
Opportunities to sales		KONE
Contact mass utilization		Outotec
Website traffic		Mirum clients, Avaus clients

6.6 IT landscape

All companies and Avaus clients have integrated marketing automation to CRM. According to Wärtsilä and Mirum interviewees this is the most important integration. Outotec representative considers their marketing automation system as a part of CRM as basically all required data comes from CRM.

All companies as well as Avaus clients have also integrated marketing automation to company website. Mirum interviewee considered this as the second most important connection if there is personalized content. Wärtsilä also has connections to webinar platforms and a data enrichment application programming interface.

Most of the companies have linked marketing automation to social media. Social media channels include LinkedIn, global and local Facebook pages, Twitter pages and YouTube channels. Kemppi has also linked the tool to its blog.

Master data storage practices vary. Wärtsilä has a separate master data warehouse from which data flows via SAP and CRM to marketing automation. In KONE, marketing automation is the marketing lead master data storage and CRM the sales lead master data storage. Mirum interviewee suggested to have master data in CRM and duplicate it to marketing automation.

KONE has linked marketing automation to a BI system for analytics purposes. In Outotec, data flows from marketing automation to BI tool via CRM. Also Mirum and Avaus interviewees mentioned the possibility to connect marketing automation to BI or other analytics tools. Other possibilities they mentioned are connections to advertising systems and enterprise resource planning (ERP).

6.7 GDPR Compliance

Kemppi will achieve GDPR compliance by sending multiple emails through marketing automation system to get the consent of contacts to continue direct marketing. Requesting consent is also integrated to all forms. If no consent is gotten the data of the person will be completely removed. CRM is used as the master data storage.

As none of the marketing automation tool providers provide GDPR compliance packages, Wärtsilä had to design compliant processes by themselves. All the company policies such as privacy and retention policies as well as all relevant processes such as data rights processes are GDPR compliant. Wärtsilä has processes of marketing consent collection and handling. Every single email has an opt-out possibility. The company is also going to renew all forms so that they gather consents.

KONE ensures GDPR compliance by providing an opt-out link or subscription preference in every single email. There is also a subscription preference page. People are educated to work in a GDPR compliant way. Local marketers and salespeople do not have access to marketing lead data without the support of the global team. They have access to CRM data and all leads in CRM have given their consent for direct marketing.

Marketing automation has helped Outotec to achieve GDPR compliance. It helps to segment people to those who have and have not given a consent for direct marketing and send opt-in emails and reminders about the consent for those who have not yet given it. The subscription center is used to manage the consents. The consents are categorized according to different topics. Another way of categorizing would be adding the nature of content to subscription but a more detailed matrix would become quite complicated for the customer to use and for the company to manage. Employees are trained to act in a GDPR compliant way.

Mirum interviewee points out many ways how GDPR compliance can be achieved with marketing automation. Cookie and direct marketing consents can be stored in the system and emails and forms can be used to gather these consents. Direct marketing consents can be separated so that each consent is for one kind of marketing material, for example one for weekly and one for monthly newsletter. Having all the data in one place also makes it easier to fulfil requests coming from contacts. Centralized data storage helps also Outotec to react to GDPR requests. Outotec representative raised some problematic issue with GDPR. If a contact is anonymized, how can it be ensured that somebody does not enter him or her as a new contact in the database. Another issue is that if someone asks to be forgotten should there be a register for those to avoid the person to be added to the system again. Storing the forgotten contacts in such register would mean that the person is actually not forgotten.

Avaus interviewee thinks that marketing automation helps to achieve GDPR compliance as the tool combines data from various sources. It also helps companies to understand which kind of data they collect from customers and this increases transparency. According to Avaus interviewee, all marketing automation vendors are GDPR compliant. In addition to GDPR, also upcoming European Union ePrivacy Regulation will affect the way marketing automation is used. Many companies confuse GDPR and ePrivacy Regulation with each other.

6.8 Best practices

Kemppi interviewee mentioned best practices related to processes on a general level. The order of campaign activities, the nature of campaigns, their geographical targeting, localization and overall breadth have to be determined for each campaign beforehand. The materials that have been working best are whitepapers and reference stories written by the customers themselves. According to Kemppi representative, roles and responsibilities both inside the company and with partners must be determined. Kemppi interviewee mentioned that in the implementation stage a good practice is to select a teacher who teaches people working in touchpoints with customers and subsidiaries.

Also KONE interviewee mentioned the education of system use as a best practice According to her, the best thing is to be agile. The automation cannot and does not have to be ready after the basic implementation so there are always changes that have to be done and being agile makes it easy to do changes. Marketing automation should be aligned with global business, local business and CRM.

Agile way of working as a best practice was also mentioned by Avaus interviewee. This means that marketing turns into more scientific. Intuition and hunch is replaced with numbers. It is also a best practice to keep track of marketing experiments, for example A/B testing, to get an overview and learn what works and what does not. In the long run, storing this cumulative knowledge matters more than for example optimizing short term lead generation. It is a best practice to have the whole sales and marketing process thought. There should be predefined, regular dialogue between sales and marketing and sales should provide marketing with feedback. Measuring success monetarily is also a best practice and these should be reviewed together with sales and marketing through a predefined reporting chain.

Three best practices were mentioned by Wärtsilä representative. One of them is to document everything. The tools might have five ways to do the same thing and one of them is better than the others so documenting helps to use the system in the most efficient way. The second is not to email the same contact more than twice in seven days. The third is not to buy any third-party contact list as outdated contacts in them might cause the company emails to fall into a spam trap.

The only best practice mentioned by Outotec representative is to create multipurpose template so that people can take advantage of existing content and only adjust it to the specific case.

Mirum interviewee raised progressive profiling as a best practice. It was also noted as a best practice that not all content should be gated, something should be available for free as downloading them can be tracked anyway. Another best practice is to be active with new customers when they are active. An organizational best practice is to have one key user for the marketing automation tool. He or she administrates everything, has required knowledge in the system and knows what is going on. Other best practices related to the organization are to have some strategic person in the conversation, for example the system administrator and not to try to do everything alone. One best practice is also not to lean too much on the lead score as getting the score truly accurate is very difficult.

6.9 Challenges and solutions

Change resistance as a challenge was mentioned by almost all of the interviewees as a challenge. Kemppi faced the resistance in sales as there were people who were willing to stick with their old processes. However, there were some salespeople who understood the benefits of the system. They were used as examples for other salespeople. Managerial commitment was ensured by organizing trainings for the executive board, the CEO and sales managers all over the company. These trainings contained concrete examples of which kind of benefits marketing automation has brought to other companies that are using it.

Wärtsilä faced change resistance as well. The main reason for that was that marketing became quantifiable and turned from art into science. The numbers as hard facts replaced opinions in what is or will be working and what is not or will not. This was hard for some marketing people to swallow. The salespeople were also resistant to the process in which marketing had more significance as they were not anymore doing what sales told them to do.

Wärtsilä is overcoming the resistance over time. Mindset is changing as it is difficult to argue against numbers. There has also been a demographic change as younger, more data-oriented people are taking positions in marketing. They are more receptive towards the system and feel more comfortable when using it. Managerial commitment was also mentioned as a way in Wärtsilä to overcome the resistance. There is little room for arguments against the use of the system if the top management wants it to be used. There was a difference in change resistance when migrating to the new system. The simpler, easier and more nice-looking software helped to overcome some of the previous change resistance.

The new way of thinking has caused change resistance in KONE in both in sales and marketing. To overcome this in marketing, traditional marketing communications takes care of content creation and digital marketing team is concentrating in processes. Sales is convinced to support the new way of working by communicating the benefits to them in a language they understand.

Outotec has not faced change resistance as such. However, some users have adapted the system faster than others. The challenge is whether people implement the system processes or stick to the old way of working and if the company can get everything out of the system. Time is required for the change to happen. Marketers should be provided with good examples of the benefits of the system.

There has been change resistance in the organizations of Mirum clients. Some people challenge everything and want to stick to their own old way of doing things Some people are afraid that marketing automation will make them useless and that they will lose their jobs. In these cases, clients are educated to create a new mindset and understand that marketing automation will alter their way of work to be more efficient. In many cases, change resistance has happened in sales. It has been a shock to realize that marketing automation will generate them less leads. Coaching the salespeople to understand the new way of work and reasons behind it has been needed. Nowadays such coaching is done proactively in every implementation project. Also the younger, new salespeople joining the organizations are more receptive towards the system than old people who retire over time.

Sales involvement is seen as a challenge by Avaus interviewee. Marketing and sales should establish a common terminology starting from the definition of lead, i.e. what does a lead mean and what is a qualified lead. Common processes should be established and both sales and marketing should be committed to these. It should for example be agreed what kind of feedback does sales give to marketing.

Wärtsilä faced also big challenges when it migrated from one system to another. There are no features in any of the tools available in the market to move data from one system to another and all data up to that point was lost. Almost all the usage-related challenges Wärtsilä has encountered are technical. The system is very buggy. From the use point of view, the A/B testing sometimes lacks statistical significance if the results are close to each other. The interviewee mentioned one potential problem related to using the system is that somebody sends a bunch of emails to wrong recipients such as people who have unsubscribed but no such things have happened so far.

Another system-related challenge according to Wärtsilä interviewee is that none of the tools are designed for large B2B companies. They are lacking required features and the tools are designed for smaller user bases and contact lists. For example, all 3000 sales users have to be entered to the system manually instead of importing the users from CRM. Due to the limitations in the interface, the data in the system is not extractable or reportable. Avaus interviewee also raised a point that many marketing automation system targeted for B2B companies have been built to meet the needs of quickly growing software as a service companies which need a large number of leads from the web to grow rapidly. There is no software targeted to the manufacturing segment. If such software existed, it would be slightly different than the existing tools.

KONE interviewee pointed out a challenge that some local marketers see their markets as special and want to change everything created on global level although there is no real difference. Usually there is no other need than to translate the content. If local marketers start to do changes the entire process becomes more inefficient. To avoid such, the global creator of campaigns should be strict and make clear what can be customized and what not. Another challenge in related to local marketers KONE has had is that the local marketers lack required digital skills. Trainings are one solution to achieve the required skills and this on the other hand requires prioritization in the organization coming from management.

Another challenge in KONE related to content creation is that the content is targeted to be ready when the marketing automation campaign is launched. This is not enough as the technical setup requires some time. Therefore, at least half of time for campaign should be reserved for technical setup and the content should be ready by that, preferably as soon as possible. Mirum clients have faced the same challenge and solved it in the similar way.

One challenge mentioned by KONE representative is the technical compatibility of marketing automation to the rest of the IT landscape. In order to enable needed data flows extra functionalities have to be enabled inside the system in question. It was also a challenge to have CRM team onboard with marketing funnel in addition to sales funnel they have been serving before.

Outotec faced some technical problems in the implementation. The implementation partner helped to solve the problems. Some technical problems have occurred during the use as well but they are solved with support from the system vendor and help from the implementation partner. Lack of contact master data was also one challenge Outotec faced then. The new CRM as a master data storage has helped getting contacts to marketing automation.

One challenge in the use for Outotec is that the head of marketing is also the system champion. He can dedicate only a part of his time for this task so a better option would be to have a dedicated champion. The lack of time is also a broader problem in the usage and development of the system. As Outotec is not yet taking advantage of targeted messaging with the marketing automation it is a challenge to distribute interesting content to mass audiences. As soon as such is implemented the mass distribution to mass audience becomes an opportunity as the messages are customized.

One challenge mentioned by Mirum representative is that some of their clients cannot use the system and do not understand the whole potential of the system. This is overcome by training clients to use the system. Some clients have not taken the system seriously enough. For example, it has been thought that somebody in the organization is capable to operate the system but in reality the person has not been capable to handle all the tasks. These have been solved by recruiting somebody to take care of the system. When using the systems there have been only a little “pain” when new things are introduced. Mirum is able to prevent and cure these with established processes to solve usage problems.

The most common challenge for Avaus clients in the implementation is that the quality of the contact data of the company is worse than thought. A way to overcome the impacts caused by this challenge is that the quality of contact data should be determined as soon as possible. If or when data is missing for example about a complete segment, corrective actions should be made for instance by generating traffic with digital marketing and by that having people to fill forms and give contact details. The most significant challenge is the lack of courage when starting to use the system. The initial use is too small-scale, which leads to unimpressive results and the organization does not commit to the use of the system. In the worst-case scenario marketing automation becomes an expensive email tool.

One challenge in Avaus clients is that content creation process has to be renewed as the content has to be created and written in a new way. This is however usually thought in a too complicated way. It is enough to reformulate existing content to support use case and customer path thinking to serve the purposes of marketing automation. On the other hand, many Avaus clients are thinking that marketing automation is an easy task to do. Not enough resources are given as it is seen that it is not important. Avaus interviewee pointed out that marketing automation requires investment of time and knowledge to use all system features and to fully exploit data provided by the system. It is also a challenge if only one person has the knowledge. If this person leaves the organization, all knowledge is lost. Therefore, there should be broad knowledge of the system in the marketing organization.

In addition to doing changes to overcome challenges, companies have also made changes due to other reasons. In Kemppi, CRM-related processes were improved to dedicate leads to salespeople who are in responsibility of that specific geographical area where the lead is from. There are also new campaign structures. Data generated by marketing automation is also available in the company analytics software.

Wärtsilä has switched the development responsibility from the business divisions to the central function. The ownership of the marketing automation has been switched from information management to communications and branding. The marketing automation manager is working in this function. The user base has grown from seven users to 70 after the tool migration. The lead process has changed to meet the needs of marketing better as originally it was designed only for sales. Also lead scoring has been altered.

After the implementation, KONE has introduced a marketing funnel data model. There have also been suggestions coming from the users about useful features such as calendar reminders, and KONE has implemented these in the system.

Outotec is running its marketing based on Scrum. This means an iterative approach to marketing which as such results in changes in processes, also in marketing automation. Processes are adjusted based on continuous learning and development. Outotec has begun to monitor the data they have gathered with the system, for example which kind of data there is. They monitor the effects of marketing actions on growth of the contact database and adjust the campaigns to gather more contacts.

Mirum clients are in a way going through constant changes. These include for example increasing the efficiency. Process changes and especially renewals are needed during the usage. Some clients must have started to monitor how many emails does a contact receive.

Avaus clients have gone through changes over time, the process can last for years. Changes include recruitments of new kind of people, new systems and change in responsibilities, ways of work, reporting etc. Management is often willing to see business cases that marketing automation has actually been successful. They must be provided with data showing not only that marketing automation is successful but also that the sales process requires time.

7 DISCUSSION

This chapter discusses the findings of the thesis. It provides recommendations to Konecranes on how to implement and use marketing automation. It also provides answer to the research question of the thesis. Theoretical and managerial implications are presented. Finally, the limitations of this study are discussed and suggestions for further research are drawn based on them.

7.1 Results

This section provides Konecranes recommendations by answering the research question

How could a company like Konecranes utilize marketing automation in the marketing of investment goods?

As the question is broad, the answer is provided by answering to the sub-questions.

How should Konecranes implement marketing automation?

The implementation of marketing automation should be planned properly in a form of a concrete roadmap listing which actions are taken and when. This plan should be followed.

In order to make sure that people using the tool are able to do it, they should be trained to use it. These trainings should provide comprehensive competence on how to use all features of the existing tool. They can be carried out either internally, by the system vendor or by the implementation partner whichever leads to the best result. In addition to competence, system users should also be trained to use the system in a legally compliant way.

In addition to trainings, stakeholders such as other marketers and salespeople should be educated about the benefits the tool brings to them. This can be done especially in sales by following the example from literature and selecting opinion leaders among salespeople to educate the rest. Managerial commitment in the implementation process is also important to facilitate it.

Understanding the benefits is closely related to a needed cultural change. Marketers have to understand that marketing becomes quantifiable and data-oriented and act accordingly. Continuous learning should be enabled. Sales should value lead quality over quantity when it comes to leads provided by marketing automation. Managerial commitment is also required to facilitate the cultural change.

It is crucial that marketing and sales do cooperation during the implementation. This includes education about benefits, setting lead scoring and lead qualification criteria together as well as having common targets.

Konecranes should nominate people or establish a team of nominated people to operate the system to ensure that there are enough resources in place for system use. This most likely leads to recruitments. These people should create the content and workflows to the system.

Given the urgency to reach GDPR compliance, Konecranes should proceed as planned and implement email marketing capabilities immediately everywhere in the company to ensure GDPR compliance of email marketing.

In order to ensure the effectiveness and in general proper functionality of email marketing, once basic email marketing processes are in place, the following step should be to define lead scoring. As Konecranes is a big company consisting of various business areas with their own characteristics, the example of Wärtsilä should be followed and multiple lead scoring should be defined, for example at least one for each business area. Inside the business area industrial equipment, there could be different lead score for each brand or at least separate scores for industrial cranes and components depending on how many lead scores the tool subscription allows the company to have. Lead scoring definition should be done together with marketing and sales. To avoid confusion, if possible the term lead should be avoided in the context of marketing automation and talk about contacts instead.

Once lead scoring is in place and trainings are conducted, the development of campaigns taking full advantage of marketing automation can begin. The example of KONE should be followed so that the tool will be implemented first in one geographical area and then replicate the processes proven to be successful to other areas. The rollout should be done in Europe first to meet the GDPR requirements. Once the basic package is in full use throughout the company, Konecranes should evaluate whether additional features should be added to the system.

In the IT landscape, the most important integration Konecranes must do is to integrate marketing automation to CRM. Act-On leads should be entered as contacts in CRM. As Konecranes is going to do customized content, integration with the website is also significant. As unsubcription form and GDPR data request form are created with Drupal, it should be integrated to marketing automation as well. If an integration with external analytics and BI software such as Google Analytics is reasonable and needed, it should be done.

How should Konecranes use marketing automation?

Konecranes should follow the examples of interviewed companies and have unified processes around marketing automation throughout the company globally. This ensures the economies of scale. Processes can and should be tailored to meet the needs of different business areas and business units. In the beginning, to ensure the effective use of the system, localization of campaigns should be reduced to minimum, i.e. content would be translated to local language and the marketed products adjusted to meet the local offering. Once the knowledge in the organization increases, local marketers can be given more freedom in creating campaigns.

Konecranes should take advantage of cumulative knowledge the results of the marketing campaigns create and constantly improve marketing automation campaigns. It is advisable that marketing automation users share knowledge with each other to ensure that the tool is used in the best possible way. A forum suggested by the interviewed Konecranes marketing manager would be a good platform of this as it allows not only reviewing results but also discussing about them.

Marketing automation should be used for both customer acquisition and retention. Marketing should be both outbound marketing and inbound marketing. Marketing should be targeted as well as possible with segmentation to ensure the benefits marketing automation provides by customization. REANS model should be followed in inbound marketing. Information about prospects should be gathered with progressive profiling. Lead scoring should be used in definition of marketing qualified and sales accepted leads.

The following figures illustrate propositions for marketing automation processes as well as roles and core IT systems in them. Figure 12 is an overview for campaign planning and execution. Figure 13 is a more detailed illustration of an outbound email campaign and figure 14 a more detailed illustration of an inbound marketing process.

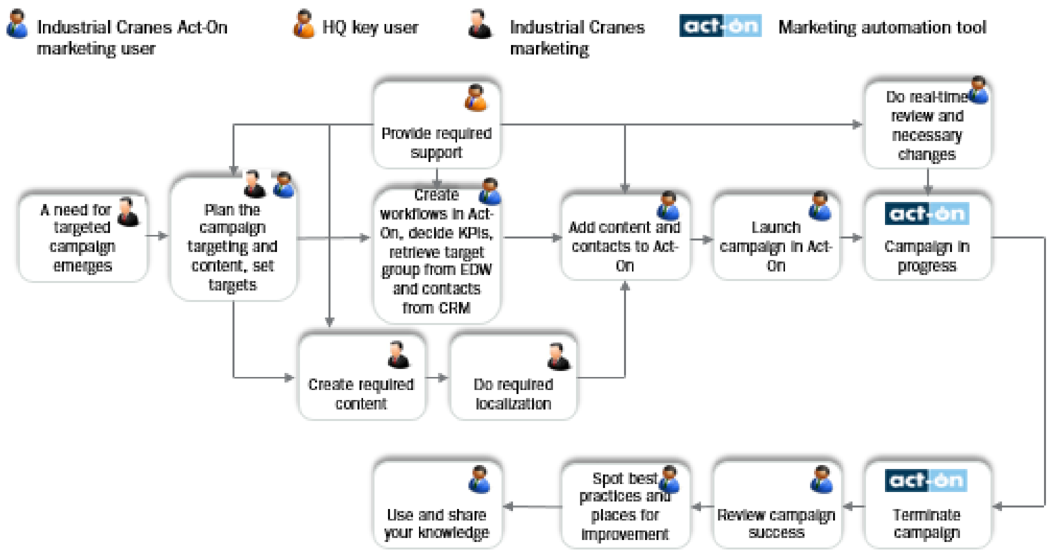

Figure 12. Marketing automation campaign planning and execution.

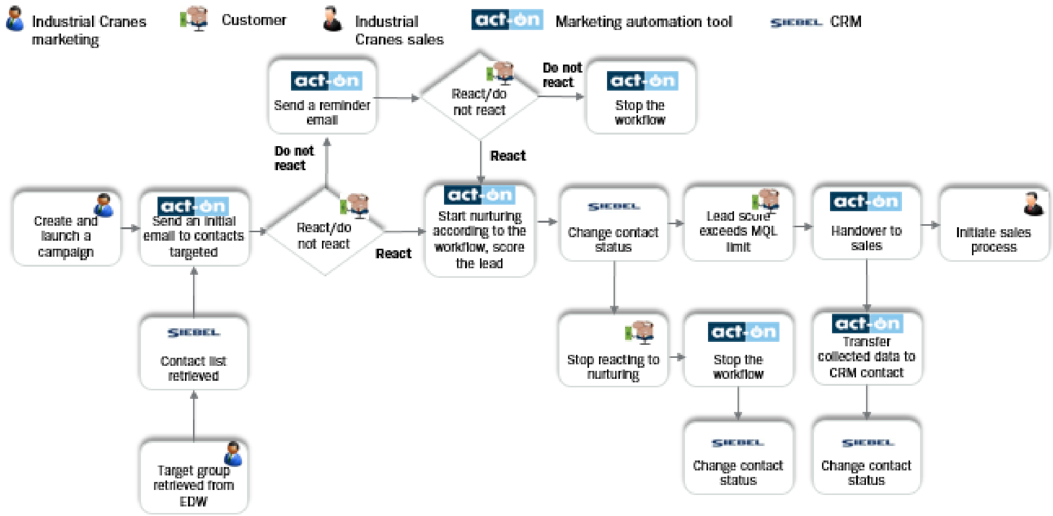

Figure 13. Outbound email marketing campaign with marketing automation.

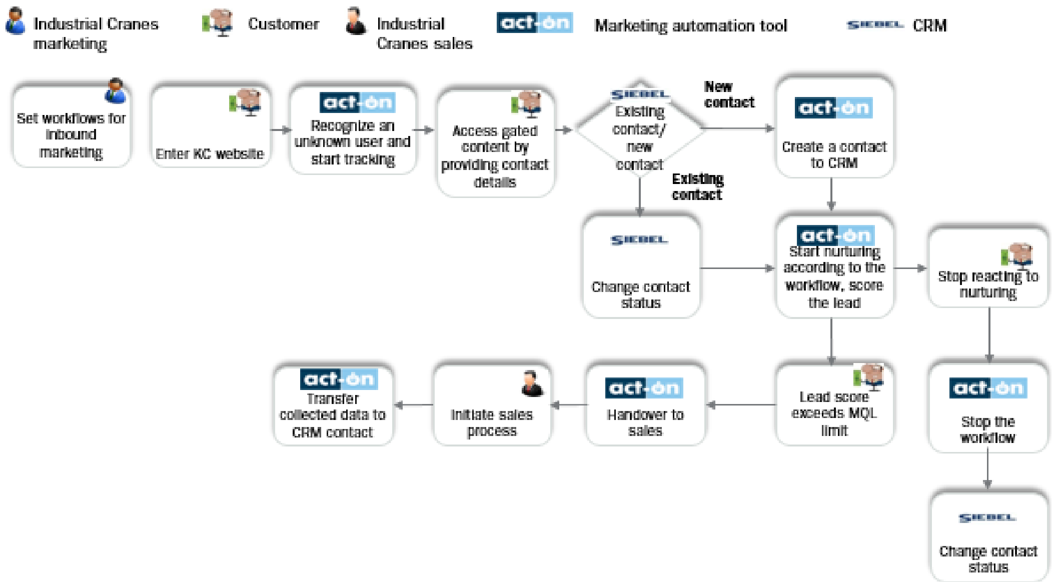

Figure 14. Inbound marketing process with marketing automation.

Due to the conflicting terminology of marketing automation and Konecranes sales process, marketing automation leads should be handled as contacts from sales point of view.

Behavioral data about customers should be stored in Act-On. Contact master data should be stored in CRM so it is accessible for everyone in the sales. Necessary behavioral data should be available in CRM to those salespeople who need it.

To ensure GDPR compliance, whenever a new contact is collected, a consent for direct marketing must be asked. Marketing emails should be sent only with Act-on and these emails should have a possibility to opt out from direct marketing. Consents and possible GDPR requests should be stored in CRM so everyone potentially using customer contact information can see if there are restrictions to use the data. All employees using customer data should be trained to do it in a GDPR compliant way.

The limited amount of marketing and sales users should be divided to headquarters and the three different business areas so that the needs of the business areas and HQ are met. If one business area requires clearly more users than another, the division should respond to this instead of being equal. The marketing users in different business areas should create workflows and run campaigns. Local marketeers should provide them with localized content.

Someone from marketing, preferably Vice President of marketing and communications should have ultimate responsibility of the use and implementation of the tool. There should be at least one dedicated key user in the headquarters marketing and communications whose full-time job is to operate and administrate the system as well as to provide support for marketing and sales users. If the skills and workload of business area users permitted, a team could be formed from HQ key user and marketing users inside the business areas to provide support to other tool users and to do decisions regarding the system and by that replace the steering group. IT should do close cooperation with these people to ensure the technology-related competence in system use and administration. Inside business area Industrial

Equipment, there should be at least one marketing user for Industrial Cranes and one for Components.

Konecranes should make a division on campaign-level KPIs and company-wide KPIs. Campaign level KPIs could include KPIs related to single marketing actions and to the complete campaign such as amount of new contacts, open rates and click rates. There are KPIs that are suitable for both campaign and company level. These include amount of new leads and amount of marketing and sales qualified leads as well as revenues generated, costs saved and return on investments. In addition to these, utilization rate for contact mass should be one company-level KPI. Company-level indicators should also be monitored on business area level as Wärtsilä does. Monetary KPIs should be used only if there is exact data available on revenues and costs and they can be tracked to campaign level.

Success should be monitored real-time or at least weekly with analytics features of Act-On. If the tool provides valuable data for analytics and BI software an integration to enable this data flow should be done. Broader review on success should be done quarterly.

What kind of best practices should Konecranes follow?

Konecranes should define as much beforehand as possible when marketing automation is implemented. The system should be used in an efficient way by automating as much as possible and taking advantage of economies of scale by having shared and harmonized processes. Everything should be documented so that everyone knows what is the most effective way to use the tool. The way of working should be agile so that changes are done when needed. This includes for example adjusting lead scoring. People should be educated on the benefits of the tool. Especially sales should be convinced.

The content in the campaigns should be consistent throughout the company. Information about leads should be collected through progressive profiling with gated content. However, not all content can be gated, something should be available without providing information. In the beginning, new leads should be contacted as soon as possible. Communication frequencies should be line with communication coming from the lead and maximum one or two emails should be sent in seven days.

As a best practice, Konecranes should avoid challenges other companies have faced. If a challenge emerges, an example of other companies should be followed to solve it.

One of the most likely challenges Konecranes is going to face is change resistance in both marketing and sales. It might be difficult to get marketers to abandon their intuitions and feelings and replace them with hard facts. Sales might stick with their old way of working as well.

There are many ways to overcome change resistance. Marketers and salespeople should be educated and coached about marketing automation benefits. Opinion leaders in sales should educate other salespeople. Sales should be involved in the implementation. Managerial commitment is required. If needed, tasks in marketing can be divided so that different people work with marketing content and marketing automation tool. Time might also help to overcome the resistance as it requires time for people’s mindset to change. Over time more data-oriented and more technologically savvy marketers might also replace the most conservative ones.

Konecranes might end up in a situation that there is lack of resources in marketing automation. That can be avoided by nominating dedicated people to use marketing automation from the very beginning and providing required funding for marketing automation.

Marketers might lack needed skills for system use. This might lead to underutilization of the system. This can be avoided with proper training. Such training should also be prioritized by management. Content to campaigns might be constantly too late if content deadlines are the same as overall campaign deadlines. Therefore at least twice as much time as content production requires should be reserved for other development of campaigns.

Local marketers can also see their markets as something special and do not stick with the global processes, which leads to losses of economies of scale. The work of local marketers should be controlled but not too tightly.

Existing contact data might be bad in quality. Therefore, the data must be evaluated and cleaned before the use of it is started. New, high quality contact data should also be collected by reaching, engaging and activating customers to give their contact details. Konecranes might also face technical problems which can be solved internally or by vendor or partner.

7.2 Theoretical implications

Many of the empirical findings of this study support previous findings in research on marketing automation. There are also some issues that did not get empirical support and issues mentioned by interviewees that are not mentioned in the literature. This section discusses the similarities and differences to provide the theoretical implications of this thesis.

There are several reasons why different companies have implemented marketing automation but none of them are directly related to numerous benefits mentioned in the literature. Only Konecranes mentioned these benefits, such as increased efficiency in marketing as a reason for implementation. Other companies wanted to keep up in the development and ensure competitive advantage.

The basic processes of marketing automation in the interviewed industrial companies are like it is described in the literature. User behavior determines the actions the system takes and gives valuable information to sales. Leads are nurtured and once they have high enough lead score, they are moved to sales. Salespeople takes advantage of the information provided by the tool. Moving only high-quality leads forward was mentioned by only one interviewee. None of the interviewees said that the least potential leads are completely dropped out from the system as suggested by Dworkin (2016). The system KONE and Outotec have in place to define marketing and sales leads based only on filling in certain forms is not mentioned in the literature.

Marketing automation is used for both customer acquisition and retention in all interviewed companies. It was pointed out that customer retention can simultaneously be customer acquisition for another division in the company. This is the case for example with Wärtsilä Services division. Such is not mentioned in the literature.

Setting prices with marketing automation was mentioned by no one, all companies use marketing automation for promotion only. Different ways of promotion mentioned in the literature such as email, social media and search engine marketing are in use.

Data collection is done in both active and passive ways. Many interviewees highlighted progressive profiling in data gathering which is also pointed out in the literature by Todor (2016) and Ginty et al. (2012, 185). Literature mentions the lack of reliability in identification through passive data gathering that was noted by many interviewees. None of the interviewees mentioned the issue of asking too sensitive information which is mentioned in the literature by Todor (2016).

As mentioned in the literature, lead scoring is seen hard by the interviewees and it is nearly impossible to get it right at once. Basing lead scoring on some sort of ideal customer or generic buyer as suggested by Davies (2015) and Grossberg (2016) was not mentioned by the interviewees. Lead scoring in the companies is mostly based on behavior, not so much on demographic background. What is not mentioned in the literature is that one company can have multiple lead scores like Wärtsilä does.

There are several ways of segmenting mentioned in the literature. From these, interviewees do the segmenting based on demographic data such as region or industry of the company as well as based on the interests of the customer. Stage in the buying cycle and purchase history are not used as bases of segmenting as such but these influence marketing actions targeted for different types for users. For instance, new and existing customers are targeted with different messages. In general, as mentioned in literature, different segments are targeted with tailored messages.

Customer centricity as a requirement pointed out by Järvinen & Taiminen (2016) was not mentioned by interviewees but the idea that customers are provided with marketing content that is relevant to them is in a way customer centricity.

As suggested in the literature, marketing automation is also used to determine the most effective ways of marketing. If the tool in use supports A/B testing it is used by some of the interviewed companies. The results of marketing automation activities enable cumulative learning of these organizations.

Data available in the system is used for reporting in all interviewed companies. As mentioned by Ioana (2016), the indicators vary a lot. Some interviewed companies have also connected marketing automation to standalone analytics and BI software.

It is mentioned in the literature that marketing automation is not an independent system that can do everything by its own. Instead of that, content input is needed and processes must be determined by people. This was pointed out in interviews by stating that marketing automation is as smart as its users.

All interviewees use or are partners when operating and implementing marketing automation. Reasons for this are adjusting the workload as mentioned by Keens & Barker (2009) and also lack of knowledge in the customer organization. The involvement of partners varies a lot from pure technical support to complete operation and responsibility of the system.

Not all the requirements found in the literature were mentioned by the interviewees. For example, the importance of proper planning was mentioned. KONE and Mirum interviewees touched the issue that marketing content should be ready before the system use starts. Adjusting promotional content for marketing automation mentioned in the literature was also mentioned by some interviewees. It was highlighted that it is enough to adjust the content, not to create completely new.

Some requirements for data mentioned in the literature were mentioned by some interviewees. The data quality is seen as a challenge and it was mentioned that the data quality shall be checked, bad quality contacts should be removed and replaced with good-quality contacts that are collected only after mechanisms to collect them via marketing automation are in place. Compliance with the legislation was also highlighted in a way when talking about GDPR compliance.

Marketers' knowledge of the system was not pointed out as such but many interviewees highlighted that it is important to train marketing to use the system properly. The technical and analytical capabilities mentioned by Del Rowe (2016) and Putkinen (2014) were seen important by many interviewees. According to interviewees, young marketing professionals tend to have these abilities.

It is mentioned in the literature that cultural change is needed by for example understanding the analytic aspects of marketing (Biegel 2009). This was highlighted by some of the interviewees as they stated marketing becomes analytic as everything becomes measurable. Intuition is replaced with hard facts and this must be accepted. Järvinen & Taiminen (2016) suggest training as a way to facilitate change. Many companies are using training to help employees to adopt the new required mindset. Such training is in some cases done by external companies, for example interviewed marketing agencies, like Biegel (2009) mentioned. The leadership facilitation as a requirement mentioned by Redding (2016) was also mentioned by many interviewees in the form of managerial commitment.

Alignment with sales was mentioned by one interviewee but she did not elaborate further what that means in practice. However, she told that sales was involved in the implementation for example by participating in the definition of marketing and sales qualified leads. Cooperation with sales and marketing mentioned multiple times in the literature was underlined as important by all interviewees.

Ginty et al. (2012, 191-192) suggest having a team administrating the automation and that team should include people from marketing, sales and IT. Such team was not directly mentioned by the interviewees but some companies have a competence or support team which consists of marketers and helps other marketers in different parts of the organization to use the system in their marketing efforts. The administration of the system is usually done by a handful of people which may or may not have an IT background.

Same kind of integration to IT landscape was mentioned in the literature and by the interviewees. Both according to literature and interviewees, integration between marketing automation and CRM is the most important integration. It is also vital to connect marketing automation with all necessary promotion tools such as website and social media.

The importance of a roadmap is mentioned many times in the literature. It was also highlighted by many interviewees. A proper roadmap helps to carry out the implementation properly.

Wood (2015) highlights the length of implementation process. Mixed empirical support was found for this claim as some companies see that implementation can never be finished and some state that it was finished within less than a year.

However, the latter companies also mentioned that a new kind of features can always be added.

Keens & Barker (2009) suggest implementing marketing automation iteratively by adopting different functionalities at different times. This kind of approach is taken by Outotec. KONE has a different kind of iterative approach as they launched marketing automation in one country and are now replicating it to others. Such is not mentioned in the literature. A similar approach was taken by Kemppi when they launched marketing automation with pilot campaigns. Starting to use the tool with a pilot campaign is mentioned by Ginty et al. (2012, 195).

Very different kind of best practices were mentioned in the literature and by the interviewees. The practices suggested in the literature are related more to the overall use of the system such as overall efficiency and creativity whereas the practices suggested by interviewees are more specific such as progressive profiling or a tip to document everything. One similar best practice is that leads should be contacted as soon as possible.

It is suggested by Ginty et al. (2012, 195) that those salespeople that are respected should be introduced to the system first. Such was not mentioned by the interviewees but in Kemppi those salespeople that first understood the benefits of the system were selected to train the rest of the salespeople. On a more general level, KONE educated people on the benefits of marketing automation. Ginty et al. (2012, 188) suggest that communication frequency to customer should be in line with the communication frequency from the customer. Communication frequencies were pointed out by some interviewees as they mentioned as a best practice that a customer should not be contacted too often.

Some potential problems arise in both the literature and in the interviewed companies. The most common and a severe one is change resistance especially in sales. The solution for this in both the literature and interviewed companies is convincing and training employees to understand the benefits of the system for their own work.

The underutilization of marketing automation tool causing the tool to become just an expensive email tool is mentioned in the literature and by Avaus interviewee. The importance of education on the tool to solve the problems caused by lack of knowledge were highlighted in the literature and by the interviewees.

Another tool-related challenge not mentioned in the literature is that there are no software targeted to B2B companies, which leads to minor issues when using the software. Technical problems with the tool are not mentioned in the literature as a challenge.

It was not mentioned in the literature that some marketers may consider their local markets special and therefore are not willing to follow common processes as the case was with KONE.

Many kinds of key performance indicators are mentioned in the literature and are in use in the interviewed companies. Such KPIs mentioned in the literature that are also in use in companies are for example ROI and different conversion rates. The argument by Shirazi (2014) that KPIs should be monetary was both supported and questioned by the interviewees. The argument of Swieczak (2013) that KPIs should be related to different time requirements gets some empirical support in the case of KONE as they are aiming for overall faster execution but this is not directly related to any specific KPI they have.

Out of the interviewees, only KONE interviewee touched the future of marketing automation. Her predictions on emerging role of IoT in marketing automation are in line with those mentioned in the literature.

Literature so far has not discussed the role and responsibility division around marketing automation or how the tasks are divided between headquarters and local units in global companies. There are several ways to define responsibilities. The responsibility and administration is either in marketing or in IT. Marketing is always involved in the system use. It depends on the company and its processes if sales has direct access to the system or if they take advantage of the data provided by the tool via CRM. Some companies also have analyst users in the system.

Companies tend to have unified processes in different business areas, divisions and units to reach economies of scale. The processes are also more or less unified globally. This works as people behave to some extent the same way regardless of their country of origin. Campaigns and contents are tailored to meet the needs of business area in question as well as region. On local level, the role of local marketers varies from content translation to carrying out local campaigns individually.

7.3 Managerial implications

The generalization of the recommendations for the case company provides implications for managers when implementing and using marketing automation.

The implementation of marketing automation should be planned properly. People should be trained to use the tool so that they have competence to use it and can use it in a legally compliant way. Stakeholders should also be educated about system benefits as this reduces change resistance. Marketing and sales must do cooperation.

The implementation should begin with lead scoring definition by marketing and sales. Next, employees should be trained. The implementation of features should be done iteratively. One option is for example to implement the system in one country and then roll it out to other countries by replicating the developed processes.

A cultural change is needed in a company. Marketers must understand that marketing becomes quantifiable. The data also gives possibilities for constant learning and that should be taken advantage of by for example sharing knowledge. Sales has to understand that marketing automation might provide less leads but they are higher quality. Managerial commitment is needed to facilitate the change.

If a company is global and has multiple business areas, there should be unified processes to reach economies of scale. These processes should be adjusted to meet varying needs of different businesses and regions. For example, each business area or equivalent should have its own lead score. At first, campaigns should be localized in terms of language and offering. After the knowledge has increased, local marketers can be given more responsibility.

Marketing with marketing automation should be both inbound and outbound marketing and it should be used for both customer acquisition and retention. If a company has for example a service business it should be taken into account that the same customer can be simultaneously a customer for new equipment and a new lead for service. Progressive profiling should be used for active data gathering.

There should be a dedicated key user operating and administrating the system in the company headquarters. Responsibility should be in marketing but IT should also participate in system administration. If there are multiple business areas, each of them should have at least one person working full-time with marketing automation.

There are various KPIs a company can use. KPIs suitable for campaign level review of success are for example amount of new contacts, open rates and click rates. KPIs suitable for both campaign and company level are for instance. amount of new leads and amount of marketing and sales qualified leads as well as revenues generated, costs saved and returns on investment. KPIs for company level include for example utilization rate of contact mass. There can be KPIs for business area level as well. Monetary KPIs should be used only if there are exact data available on revenues and costs and they can be tracked to campaign level. Success should be monitored real-time or at least weekly. Broader review on success should be done quarterly.

The most important IT landscape integration is to integrate marketing automation tool to CRM. Another very important integration is integration to website. Other integrations such as integration to social media and analytics tools are made if such features in the automation tool are taken into use. Behavioral data and contact data should be stored in a way that everyone who needs access to it has the access.

To ensure GDPR compliance, consents for direct marketing must be collected from contacts. All emails should have a possibility to opt out. There should be a mechanism in place to ensure that direct marketing activities are targeted only for those who have given their consent and have not set any restrictions. Employees have to be trained to work in a GDPR complaint way.

There are many best practices a company can follow. It is important to do a proper prior planning before the implementation and follow it. A full advantage should be taken of the system by using all its features and having unified processes to reach economies of scale. Knowledge about system use and results should be documented, lessons should be learned based on results and necessary changes should be made. People should be educated on the tool benefits. Marketing content should be consistent. Information should be collected with progressive profiling but not all content should be gated. Leads should be contacted as soon as possible. In general, communication with leads cannot be too frequent.

There are many challenges a company can face with marketing automation. Most likely of them is change resistance. It can be overcome with education and coaching on benefits, managerial commitment and redivision of roles. Time also helps as it enables change in mindset and demographic change.

There might be lack of resources so enough resources such as dedicated people should be reserved for marketing automation. Marketers might lack required skills and are not willing to follow common processes. This can be avoided with education and control. Content in campaigns might be late so content creation processes should be revised.

Existing contact data might be bad in quality so it has to be gone through and new contact information should be gathered. There might be technical problems in which the vendor or a partner can help.

7.4 Limitations and suggestions for further research

As the case is with every study, also this study has its limitations. The whole thesis is based on situation and requirements of a single Finnish case company manufacturing investment goods for global B2B markets. All the directly interviewed industrial companies are also manufacturing industrial goods for global B2B markets and in addition are all Finnish. The interviews with marketing agencies were also mostly about Finnish companies operating on B2B markets. Further research should include multiple companies from various kind of industries and also from B2C sector. Companies could be for example consumer good companies, IT companies and service companies.

This research found empirical support for previous research but also contradicting and new kind of results. Future studies on a similar topic should be done to find either support or contradictory evidence to the findings of this study. Future studies should be conducted especially on roles and responsibilities inside a company as to author’s knowledge this is the first study to date on the topic.

8 CONCLUSIONS

Implementation of a marketing automation tool in a B2B company is a complex and lengthy process which can even be described as never ending. A finish point for the initial implementation can be determined but there are always improvements to be made and new features to be implemented.

How the implementation should be done and the system used depends on the requirements and targets of the company in question as well as capabilities of the tool. Also the features of the company such as organizational structure and products sold set their own requirements.

Not only the company sets requirements for implementation but the implementation sets requirements for the company. A cultural change is needed both in marketing and sales. Cooperation of marketing and sales is crucial. Managerial commitment is also required. Marketing automation usage requires lots of resources such as people working with it and money. Dedicated people with proper knowledge should be working with marketing automation to reach the full benefits of the system. The overall responsibility of the tool should be in marketing and IT should be involved so that they can contribute with their technical knowledge.

If a company is selling industrial goods and services it should use marketing automation for both customer acquisition and customer retention. Which one is more important depends on the size of a typical deal and amount of existing and potential customers in the market. The more complex projects the purchases are the less customers there are the less important customer acquisition is. In any case the role of customer retention cannot be ignored as it helps to maximize customer lifetime value.

An international company should have common processes in place with suitable amount of localization and tailoring. Common processes and tailoring apply also for a company with multiple business areas selling various kinds of products.

There are various metrics for success. Some of them are for campaigns, some for the whole company. Some involve money, some not. KPIs should be selected depending on the situation and monetary KPIs should be used only when exact information on revenues and costs is available.

IT landscape around the system should include integrations with all necessary tools and platforms such as CRM and website. Proper integration and data storage together with competent employees helps companies operating in the European Union to do marketing in a GDPR compliant way.

There are many best practices a company should follow. For example, prior planning is important, full advantage of the system should be taken and continuous learning and improvement should happen in the organization.

There are many challenges a company might face but there are also solutions for them. Change resistance is the most likely challenge and there are various ways to prevent and overcome it. Other challenges include lack of resources and knowledge, bad-quality contact data and technical problems.

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APPENDICES

Appendix 1: Interview questions for industrial companies

Implementation

1. When did you implement marketing automation?
2. Why did you implement marketing automation?
3. How long did the implementation take?
4. Is the implementation process finished?
5. Did you have a roadmap? How was it like?
6. What requirements did the company face when implementing?
7. Did you do any organizational changes, for instance structural or cultural?
8. Which kind of problems did you possibly come across with the implementation? How did you solve them? Could they have been prevented somehow?

Use

1. How do you use marketing automation? Which kind of processes do you have?
2. How do you gather data?
3. Have you encountered any problems when using the system? How have you solved them?
4. Have you developed any best practices?
5. How have you defined roles and responsibilities?

IT landscape

1. How have you integrated marketing automation to your IT landscape?
2. Is marketing automation a part of CRM?
3. Is your customer data handling GDPR compliant? How have you achieved compliance?

Measurement

1. Which kind of targets have you set for marketing automation?
2. How do you measure success?
3. Which key performance indicators do you have?
4. How often do you review success?
5. Do you do changes when needed? Which kind of changes have you done?

Appendix 2: Interview questions for marketing agencies

Implementation

1. When did your customers implement marketing automation?
2. Why did your customers implement marketing automation?
3. How long did the implementation take?
4. Did they have a roadmap? How it was like?
5. What requirements did the clients face when implementing?
6. Are they ready with implementation?
7. Did they do any organizational changes, for instance structural or cultural?
8. Which kind of problems did they possibly come across with the implementation? How did they solve them? How could these be prevented?
9. How roles and responsibilities have been divided with you and clients?

Usage

1. How do your clients use marketing automation? Which kind of processes do they have?
2. How do they gather data?
3. Have they encountered any problems when using the system? How have they solved them?
4. Have they or you developed any best practices?
5. How have they defined roles and responsibilities?

IT landscape

1. How have they integrated marketing automation to their IT landscape?
2. Is marketing automation a part of CRM?
3. Is their customer data handling GDPR compliant? How have they achieved compliance?

Measurement

1. Which kind of targets have they set for marketing automation?
2. How do they measure success?
3. Which key performance indicators do they have?
4. How often do they review success?
5. Do they do changes when needed? Which kind of changes have they done?

Appendix 3: Questions for Konecranes employees

Targets

1. Why has Konecranes decided to implement marketing automation?
2. What are the targets set for the system?
3. How many users there will be? Where do the users come from?
4. When the implementation should be complete?

Act-On

1. What Act-On is capable of?

Best practices

1. Have you heard about any best practices?

Problems

1. Have you heard of any problems and solutions for them?

IT landscape

1. What kind of integration is needed?
2. Is marketing automation part of CRM?
3. How does the marketing automation help to achieve GDPR compliance?