Framework for Marketing Automation:

Case Vaisala

Masters' Thesis

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SUMMARY

This study is aimed at Marketing Automation, the creation of framework for the adaptation of it, and the utilization of it to manage the marketing and sales funnel. The study was conducted using the case-study framework. Primary data used in this study was collected with semi-structured interviews and the secondary data was statistical data from the sales' CRM system. The literature review reveals that the subject is not well researched. Clear gaps in the research are how to start to use marketing automation and how to build the campaigns and programs needed for it. The findings from the case-study show clear problems with the current marketing and sales funnel and also the parts where marketing automation could be of use. Most of the evident problems are in the tradeoff of the customer between marketing and sales. To work Marketing Automation requires clear definitions for what the company considers a Lead and how it should be handled. To ensure that it works and develops with time, feedback on the Leads and customers is also needed. An area which also requires change to ensure that Marketing Automation works is the way marketing campaigns are planned. They should be planned together with sales and should be focused on the customers' journey. A future goal for the system should be the personalization of messaging and the profiling of the customers. Future research into this subject would be very useful for companies, especially if they were aimed at adaptation, personalization or profiling.

TIIVISTELMÄ

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Hakusanat: Markkinoinnin Automaatio, Automaatio, digitaalinen markkinointi, sisältömarkkinointi, RPM, teollinen markkinointi, myyntiputki, myyntiputken hallinta, liidi, personointi

Työ käsittelee Markkinoinnin Automaatiota, viitekehyksen rakentamista Markkinoinnin Automaation käyttöönottoon ja sen hyödyntämiselle markkinoinnin ja myynnin putken hallinnassa. Työ on suoritettu tapaustutkimuksena, jonka primääri datana on käytetty puoli-strukturoituja haastatteluja ja sekundääri datana on käytetty dataa myynnin tietojärjestelmistä. Kirjallisuuskatsaus markkinoinnin automaatioon paljastaa, että aihetta ei ole juurikaan tutkittu akateemisesti. Etenkin selkeitä aukkoja teorioissa on miten markkinoinnin automaatiota kannattaisi aloittaa ja miten siihen tarvittavia kamppanjoita kannattaisi rakentaa. Tapaustutkimuksen tuloksena selvisi selkeät ongelma kohdat nykysessä markkinoinnin ja myynnin putkessa, ja myös kohdat joissa markkinoinnin automaatio voi olla avuksi. Suurin osa ongelma kohdista on markkinoinnin ja myynnin välissä. Toimiakseen markkinoinnin automaatio vaatii selkeät määritykset yrityksessä Liidille ja miten sitä käsitellään. Toimivuuden takaamiseksi se tarvitsee myös jatkuvaa palautetta liideistä ja myynneistä. Alue mikä myös tarvitsee muutosta paremman toimivuuden takaamiseksi on markkinoinnin kamppanjoiden suunnittelu, yhdessä myynnin kanssa ja asiakkaan polku edellä. Tulevaisuuden tavoitteena tulisi olla viestien personointi ja asiakkaiden profilointi. Tulevaisuuden tutkimuskohteet olisivat erittäin avuliaita yrityksille, varsinki jos ne käsittelisivät käyttöönottoa tai personointia.

1   INTRODUCTION

Marketing in the world of constant communication is a hard task, and trying to handle customer bases of thousands with ever stricter budgets for human resources makes the marketing even harder. To combat the rising competition and resource scarceness marketing departments have to rely on information systems to push their messages to their customer base. Marketing automation is the continuation of this trend. With it you are automating some of the customer relationship management. This alleviates the strain on resources and helps marketing and sales to focus on their core competences. Marketing automation could also be used in nurturing new customers and cycle selling to existing ones. Marketing automation is a part of a larger striving for revenue performance management in the marketing funnel. The process should be easily analyzed and used to better understand the customer on a larger scale. Marketing automation also provides the statistics for budgeting purposes and the management of the whole marketing and sales funnel (Kitchen, P. 2015, Heimbach, I. 2015)

There is a severe lack of theories pertaining to the marketing automation as such with only the latest journals containing some articles that are directly focusing on the subject. For example the Industrial Marketing Management has only one article directly related to Marketing Automation, by Järvinen et Al. and it is currently in press, Journal of Business & Industrial Marketing does not have any articles directly focusing on the subject. Both of these have articles on the digitalization and the effects it has on industrial marketing and even the automation of sales force activities. Marketing Automation is a reality in today's business world and production and research of theories should reflect this trend. As a subject there are many avenues for research in marketing automation, closely tied to the research on the sales funnel. In the business to business and business to consumer worlds marketing automation technologies are utilized in strive to gain competitive advantage and to also better the customers experience. There are no theories for the funnel management using marketing automation and how the statistics, budgeting and leads should be defined in an automation system, or even how to define these for your company. There are no theories on the adaptation of marketing automation, what are the steps to take when your company is adopting marketing automation?, and how you should construct the programs and campaigns. The gaps arise from the little research conducted

into the field of marketing automation and how theories and frameworks apply to the automated systems. These two are the gaps that this study aims to answer in this case company. There is also clear need for a large scale "generic" study into marketing automation, to establish the basis for future theories. This could be done in a vendor versus a customer or new adopter versus an experienced user, to help with the adaptations of the systems. Also the literature is sparse on the profiling of prospective customers, from the categories to the methods of profiling.

There are several different vendors for software that helps marketers to do the automation tasks required. These programs do the automation part of the equation, but they need a lot of work to set up and produce the content. There is also the aspect of database management for automation purposes. Databases importance rises with the requirements for customer relationship management needs. If the customer is put in to the wrong category, then the automation will not do the right things for that customer relationship. The customer relationship management part also makes it much more important for the automation to be agile to the customers' responses, which increases the complexity of the programming required.

1.1 Changing need poses new challenges for marketing

Marketing in all its forms has gone through the change of used technologies. From the inception of Internet to the adaptation of social media and other tools we use to communicate today, the change where your customers are and how to reach them has been humongous. You cannot only call and meet with your customers, if you want to succeed in the marketplace. Especially after the 2008 financial crisis the marketing practices in firms have been re-structured for more efficient ways of contacting customers and for more efficient marketing technologies. The Internet is the logical step in this search for efficiency. You can reach thousands or hundreds of thousands of potential customers with minimal resources and with a single controllable message. Internet provides the mass marketing aspect of the marketing practices, and does not rule out traditional channels used in conjunction with it. Your customer segments are growing ever larger and larger and the only recourse in the world of dwindling of human resources is the internet. The key factor is balance between the two and it should be taken in to account when comprising strategies for marketing and branding. Branding in the digital mediums can be hard for older companies, while companies that have gotten their inception from the use of

Internet are doing their branding naturally and in innovative ways through the digital media. Promoting your brand through the means of emails, your own website and social media channels is starting to become more and more important in the world of Internet. To do this more of the process needs to be automated and the customer contact needs to be adaptive. One thing that is good to remember when dealing with the Internet in any marketing capacity, be it B2B or B2C markets in question, is that in the end the receiver is a person. This person has experienced the digital world as a consumer, so why should not the business to business side of the market work the same for him? (Chlebišová et. Al, 2011. Lipiäinen et. Al 2015.)

1.2 Purpose of this study and research questions

Revenue performance management (RPM) has been used as a buzzword in the marketing industry for a while. Oracle (2015), a large provider of software for marketing and other business purposes, defines revenue performance management as:

> *"Revenue Performance Management (RPM) is a systematic approach to identifying the drivers and impediments to revenue, rigorously measuring them, and then pulling the economic levers that will optimize marketing ROI and top line growth."*

RPM can be carried out in different ways, from detailed analytics to the automatization of the marketing funnel. Marketing Automation can be used to provide the information to RPM and it could be argued that RPM is a part of the marketing automation, the analytical statistics part. The implementation of RPM needs the integration of all the systems in use in the funnel and the understanding of the whole funnel. It also requires the seamless hand-off of contact between departments. This study is aimed at creating a framework for Marketing Automation for Vaisala Group, which provides better analytical capabilities than those currently in use. This is achieved by studying the current practices and developing a Marketing Automation solution for a select part of the group that operates on a select market. With the framework Vaisala Group will be able to create better and more valuable leads in their marketing and sales funnel, and achieve efficiency gains from the automation of set tasks. There should also be a benefit in budgeting and analyzing what works in the marketing and what does not. For the purposes of this study the framework will be more of an overview, without going to specifics of marketing campaigns in question.

The research questions are based on the gaps in literature and practical challenges when companies are investing into Revenue Performance Management and Marketing Automation. The main research question is as follows:

1. How to use Marketing Automation for Revenue Performance Management?

This is further dissected to different aspects, with the most prevalent ones pertaining to the problems identified in the beginning of the study.

1.1 How could Marketing and Sales benefit from Marketing Automation?

1.2 What analytical data should pass through between the departments?

1.3 Why do contacts drop-out of the Marketing Funnel?

The study of these are conducted by semi-constructed interviews with Marketing and Sales departments, and analyzing SalesForce Lead data in a specific timeframe.

The tradeoff of the customer from marketing to the sales department is seen as a point of constriction in the marketing and sales funnel, inside both organizations in the company. There is not a clear picture what the marketing wants from sales and what sales wants from marketing, with regards to leads and the lead handling. This is both a procedural problem in the company and an analytical problem in the system. There are no set practices in place for activities and the information does not flow freely from department to department.

2 LITERATURE REVIEW

There is not much theory on marketing automation as such, but there are a lot of theories on different parts of the system. Marketing automation combines many discipline of marketing. It tries to use contemporary marketing technologies and methods to achieve maximum success with the most efficiency. Because of the nature of marketing automation it tries to comprehend the whole marketing funnel from interest to sale and beyond. There are a few pivotal parts in the theory of marketing automation: marketing and sales funnel, marketing and sales integration the use of Internet in industrial marketing, relationship marketing, customer evaluation, and marketing performance measurement. These are all explained in detail in the next few chapters.

2.1 Marketing automation

Marketing automation is the software and strategies to aid the customer journey with a highly personalized messages at the right time. It should be used to develop the contact to a buying customer, and the customer to a long term customer relationship. The implementation in a certain company requires the right specifications and understanding of the idea of marketing automation. The whole marketing and sales funnel has to be mapped out for automation before you can utilize the whole value of a comprehensive marketing automation system. The personalization is a key factor in driving the success of a marketing automation system. Personalization drives customer engagement and betters the contact. (Oracle 2015, Hubspot 2015, Sitecore 2015.)
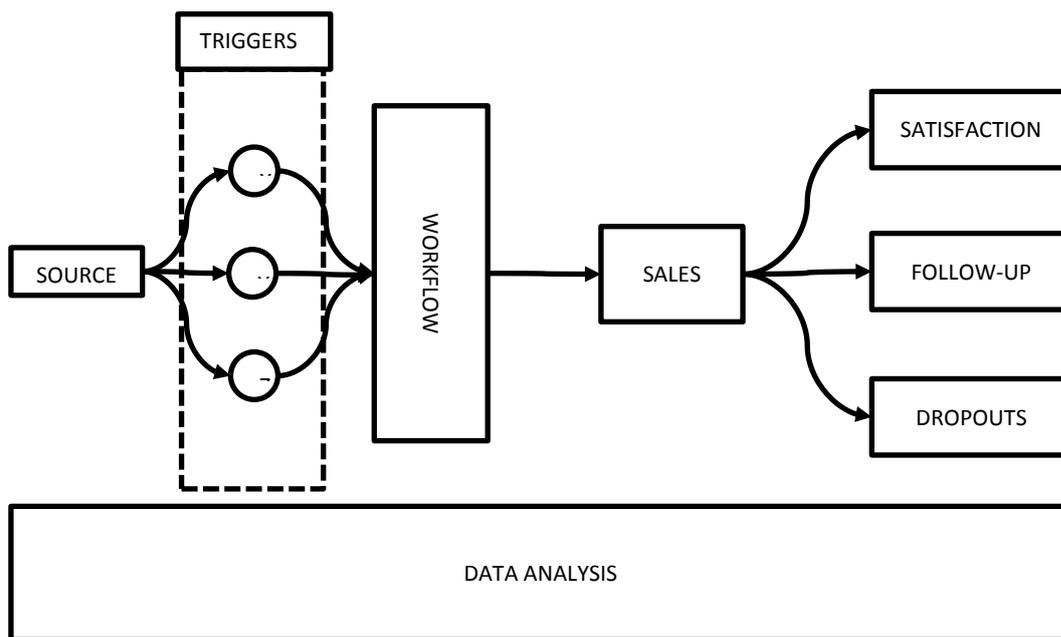
Figure 1 Basic principle of marketing automation

Figure 1. shows the basic principle behind any marketing automation system. It describes the customer journey in the marketing automation system. It starts with the source of the customer information. The trigger stage contains this customer's actions on the company's website or in any other measurable avenue. This trigger begins a workflow, which is personalized for the trigger, source and behavior. After the workflow the customer is transferred to sales and different follow activities in succession. All thought the system there is ongoing data analysis to determine where the customers journey, and to provide performance analytics.

Marketing automation can be compared to a customer relationship management (CRM) system or at least a part of the whole CRM system for the company. CRM is usually considered a set of strategies, technologies and philosophies that are used to help manage and handle transactions with customers and manage the relationships (Greenberg, 2003). Marketing automation, depending on scope, can be seen as a segment of the CRM or as the whole CRM itself. The most important reason for marketing automation is increasing the performance of the marketing unit, by more efficiently using the capabilities of the department. Nath (2010) suggests that marketing capability is the key for better financial performance. Firms focusing

on market activities do better than firms that are solely focused on operational capabilities. Also Nath (2010) finds some indication of that narrow portfolio on a diverse geographical market is better for a firm. Also the customer journey has developed into a non-linear, because of the use of Internet. (Sitecore 2015)

Marketing automation is very reliant on other technologies and various other theories. The most prominent of theories that tie into Marketing Automation are sales and marketing funnel and relationship marketing. The automation strives to create a relationship with the customer receiving the communication and the automation tries to process this contact in the context of a relationship. The funnel is important as a basis of segmenting the contacts into different stages, where they all have to be dealt with differently. Both of these are utilized in regards to Marketing Automation to create a better customer experience. There is also the inherit possibility in marketing automation, that the message you send will never be read by the recipient. It might go to the e-mail junk folders or the person receiving the e-mail can construed it as spam or un-interesting. This heightens the importance of the subject line and the content to be appealing to the recipient. (Järvinen et Al. 2015 Oracle 2015, Hubspot 2015, Sitecore 2015.)

2.2 Sales and marketing funnel

The sales funnel framework shows how businesses go from a large amount of potential prospects to a far smaller amount of real customers. The sales funnel sorts the prospective customers in to different segments by their purchasing stage. In literature there are different types of sales funnel classifications for the customers passing through it. For the purposes of this thesis adapts the sales funnel from the one put forth by D'Haen and Van den Poel (2013). D'haen et Al. (2013) categorize the sales funnel into four different stages: suspect, prospect, lead and customers. The D'Haen et Al. (2013) model ends a customer's journey at the "customer" stage, though for a truly comprehensive framework it has to be more like a loop. The loop nature of the sales funnel allows people who have bought from you to enter the funnel again, at any point in the funnel. This is how the funnel shows the relationship aspect of B2B

selling. Figure 2 shows the funnel framework to be used in this thesis. (Cooper et Al. , 2007. Järvinen et Al. 2015)
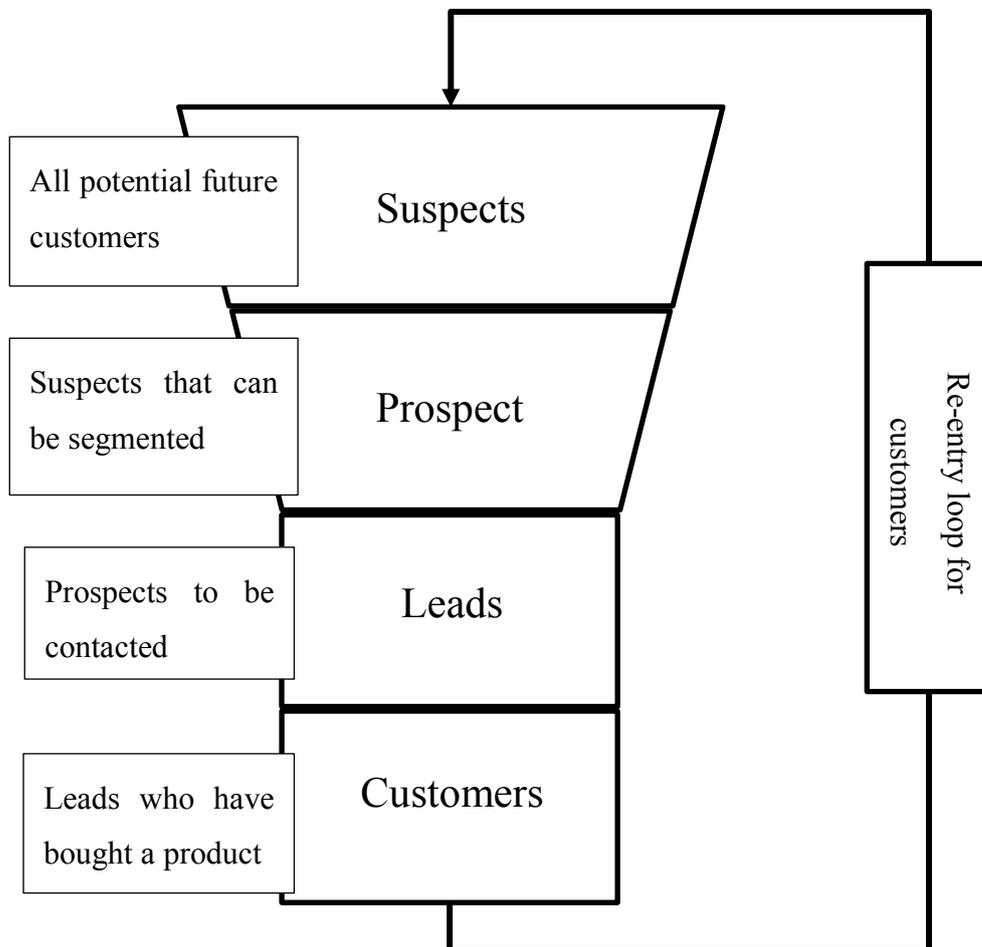
Figure 2 Sales funnel framework adapted from D'Haen et Al. 2013

Suspects are all potential future customers, which the company can identify on the market. Pool of suspects can be really large especially in the world of internet marketing, where you can contact hundreds of potential customers at once. The quantity of suspects is not traditionally the best way to attain customers, but focusing on the quality can be. The use of Internet tools can produce more quantity than traditional means and also at a better quality, than traditional means could provide for such quantities. Content marketing especially is key, because it provides the customer with information relevant to him and provides the company with relevant information about the suspects' interests. With the tracking implemented in almost everything that is done on the Internet, companies can somewhat measure the interest a customer has for

the company or its products. (Järvinen et Al. 2015. , D'Haen et Al. 2013. Moncrief et Al. 2005. Long et Al 2007.)

Picking the prospects from suspects is a task of gauging the interest of the customer and the customers purchase cycle. After the pick the customers are placed in qualification programs, where company tries to choose the ones with most profitability for prioritized care. This is an important part for the efficient use of sales people. There is not a great and academic way to do the lead qualification, but sales people use their past experiences to select the leads. The failure of lead qualification causes loss of revenue. The requirements for a profitable lead vary from company to company, and should be set within the company itself. Järvinen et Al. (2015) list the requirements for a lead include: prospect source, the prospects interest rate, prospects funds and decision making role, the prospects willingness to share information, whether the contact was initiated by the customer or the company, and whether there is a previous relationship. (Järvinen et Al. 2015, D'Haen et Al 2013, Monat, 2011.)

Leads are prospects that have been selected to be contacted more thoroughly, mostly by the sales department of the organization using more traditional means. Leads generated through online sources and content marketing lose interest quickly. Contacting a customer within an hour of receiving a quote inquiry can increase the chances of the customer going further in the funnel by seven times when compared to a contact an hour later and even more when compared to the next 24 hours. The use of marketing automation to put more emphasis on the most profitable leads and to communicate the profitability to the sales department more visibly. (Järvinen et Al. 2015, D'Haen et Al 2013, Oldroyd et Al. 2011.)

2.3   Marketing and sales integration

Marketing and sales integration is a requirement for a working automation loop. Järvinen et Al. (2015) state that the closer relationship between the departments helps the marketing automation system in creating better leads and thus creating more revenue for the company. There should be interconnectedness between the two departments, even on the planning side,

to better use the automation techniques. But from the literature finds that there are many problems with this integration and trying to better it.

There is a persisting problems between Marketing and Sales. This problem arises from lack of alignment and collaboration between the two departments in an organization. Currently the approach between these two departments are more transactional in their dealings with each other. For marketing automation the problems with marketing and sales can be discussed in two categories. Those that arise from the different IT systems in use in the departments and those that arise from the lack of collaboration. IT system problems are those of integration between two different types of software, which are used in very different ways, because of the requirements of the departments. Sales departments systems are more of managing the customers' information and logging the interactions a sales person has with the potential customers. Marketing departments systems are more focused on delivering the marketing message and targeting a certain segment precisely. Collaboration problems are most evident in lead generation and selection. If there is no collaboration between departments, no amount of automation will provide better leads. This is because there is no feedback on what good leads are and what are not, and the adaptation of the automation system cannot be utilized. Problems arise if there is not any set definitions of different stages and what is a lead, agreed upon between the departments. (Järvinen et Al., 2015, Heimbach et Al., 2015)

Patterson (2007) suggests that this could be resolved by focusing on a customer centric approach and using customers' journey to align the departments. Customer journeys could, and should, be planned to as much detail as can be achieved and should be done in collaboration between the two departments. This would help both departments to collaborate with each other and better their effectiveness. This would mean the inclusion of marketing and sales in their respective planning sessions and even in content decisions. Marketing could learn from sales people's better understanding of customers' needs and problems. Differences in thought worlds between marketing and sales have been found to be a hamper in the co-operation of marketing and sales, though there are some mediating factors. If one department is product centered and other is customer center or one looks at the long-term and other looks at the short term. So the interactions between marketing and sales can be bettered, but some roles should be set on both

parties. This shows that the total assimilation of both departments is not advisable. (Patterson, 2007. Homburg, 2007.)

2.4   Internet in industrial marketing

Global crisis has caused the switch to cheaper and more efficient communication and communication tools. The internet and social-media has provided companies with the tools and means to communicate with a large mass of customers individually or at once. The importance nowadays is given to multi-layer communication and integrated marketing communication. It is also very important that the company has a clear image of their communication and their message stays consistent. Digital marketing communications is one of the most important industrial marketing tools nowadays. Even if the firms know this, they have not used it to its full potential. Firms currently use digital marketing communications to complement customer relationship communications, support sales activities and create awareness of the company and their brand. There is also a lack of social media tool usage as a part of the digital media communications in the field of industrial marketing. The main point in utilizing digital marketing communication and the tools of it, is to supplement the normal communications and to create new customers, leads, and opportunities. Karjaluoto et Al (2015) find the four main objectivities for digital marketing to be: efficiency increases, customer relationship fostering, brand building activities and sales lead generation. Karjaluoto et Al (2015) also find that the companies themselves realize the need for better usage of digital marketing communications as a part of longer customer relationships. (Karjaluoto et Al, 2015. Chlebisova et Al, 2011)

Customers that use internet and other contemporary ways of communication and connections, need a different way of marketing communications. The customers, even in a B2B setting, have become "social" and are using the same social networking sites that consumers are using too. This new type of customers need transparence, authenticity and interaction from the corporation. Insight to the customer is needed more than ever and the information to provide this insight is more readily available. The more social customer also enables the corporation to provide better customer value, because they could use the information to better tailor their offerings. There are large positive effects in the use of internet to support marketing and sales

activities. Sales force has a central role in the success of internet marketing strategies for corporations. If the sales force is not behind the implementation and use for internet in marketing strategies, the success rate of the strategy drops significantly. Marketing and sales should work together for the selection and use of the right applications for the company. (Avlonitis et Al, 2000. Greenberg, 2010)

Online marketing provides many different opportunities and challenges. These opportunities are created from interactivity, personalization, integration, evaluation, agency structures and capabilities. The challenges are from the misuses or lack of use of the different faucets of the opportunities. Faucets are the different sections of the marketing and sales funnel, where the customer should be handled differently. There is not a lot of knowledge on how to build and manage a b2b brand in the digital age. Lipiäinen et Al. (2015) show that firms benefit from market orientation and holistic branding approach. Digital age branding requires good internal communication and for external communication the key word is consistency. B2B organizations aim to become an opinion leader is a great way for branding purposes and it should be supported with consistent messages in a multi-channel environment. (Lipiäinen et Al, 2015 Valos, 2010)

Marketers working in the field today have an increased requirement for being capable users of information technology and different applications in their day to day work. There are a many applications that have come under the umbrella of "marketing", from e-commerce systems to some parts of the ERP systems. Currently used IT-systems are not supportive for the relationship-oriented business in industrial firms. This is especially evident in the disparity between transactional IT-systems and the relationship based marketing practices. This is counter to the adoption and usefulness of larger company wide IT systems. Marketers prefer local and specialized software for their uses, and do not necessarily want to integrate to the more comprehensive IT systems. There are several different types of marketing technologies that can be used in the company's IT ecosystem. These can be split into four different groups: Brand asset management systems, collaboration tools, workflow and project management tools and online ad creation software. The marketing automation is concerned with everything but

the collaboration tools aspect, with different impacts on different technologies. Table 1 shows the benefits that these tools entail. (Ekman, 2015. Mailread, 2015, Smith 2004.)

Table 1 Marketing technologies benefits (Smith, 2004.)

Marketing technology	Benefits
Brand asset management systems	Cost reduction Brand control Faster product launches
Collaboration tools	Collateral production Cost and time savings
Workflow and project management tools	Optimized marketing processes Communication Productivity Expenditures
Online ad creation software	Organized campaign launches Brand consistency Customer response Sales channel support

Sales technology can be used to access, analyze and communicate information. Using sales technology to analyze or communicate information betters the relationship-building performance of the salesperson. Analyzing information has negative influences on sales and marketing managers' administrative performance. Salespersons personal technological expertise greatly impacts the efficiency of the use of sales technology. Also salesperson's customer selection skills and customer centric selling mediate the use of sales technology. This shows the importance to teach the methods of use for the technology, and to increase the basic self-efficiency of the salespersons as a whole. Managers should monitor the use of technology tools in the use of salespersons, and to improve that where they can. Company that has a favorable culture towards IT in general, will have a better use of sales technologies. Directly after training salespersons to use their automation tools, the perceptions are positive. Six months from implementation the usage lowers and the perceived value is not as large as at the

implementation stage. Also there are effects on salespersons job satisfaction. (Hunter, 2007. Román, 2015, Speier, 2002)

2.5 Relationship marketing and valuing customers

Relationship marketing consists of three core processes: communication, interaction and value. These processes and their management is key in creating lasting relationships with customers. (Grönroos, 2005)

Marketing communication is mostly mass marketing, but trending towards direct marketing. Integrating multiple types of marketing has emerged as a leading strategy in the marketing space, it is most commonly referred to as integrated marketing communications. This type of marketing is a two-way interaction, where the marketing evolves with the customers' response to the marketing message. This shows the clear signs of relationships in marketing communications, though it is not all that relationship marketing is. Grönroos (2005) states relationship marketing as "*If relationship marketing is to be successful, an integration of all marketing communications messages is needed to support the establishment, maintenance and enhancement of relationships with customers (and other stakeholders)*" (Grönroos, 2005)

If you focus on solely your product when marketing, you are constraining the company's strategy to the short term. The relationship model makes the customers process the focal point of the marketing mix and for success companies have to align themselves for the betterment of that process. Interaction replaces the product as the center of the marketing strategy in the relationship marketing. Enhancing the customer value from interactions creates the dialogue needed for the relationship. Interaction is the key way of creating value base, which is evident from the customers' perceived value from their process. Creation of value should be supported by and communicated by the marketing activities during the relationship with the customer. The value of a relationship can be construed from dividing relationship benefits with relationship sacrifice for the customer. For different transactions with a longtime customer the episodic value could should be the metric in determining the value. You calculate that by adding the episode benefits + relationship benefits and dividing that by the episode benefits +

relationship benefits. This shows the fact that if the relationship is very valuable to the customer, differences in episodic value can be countered with that relationship. To increase the value of the relationship is quite simple, in theory. You increase your benefits or decrease your sacrifices, though this can be hard in practice. (Grönroos, 2005. Ravald, 1996)

One way to select which customers to pursue is the Customer Lifetime Value metric. It is used a basis for the customer selection and resource allocation. Venkatensen (2004) shows that CLV gives better value customers than other metrics and provide table 1 for customer selection. Return on relationships is another measurement tool to gauge how much can be obtained from the relationship with the customer, whether it is monetary or some other relationship value. Long customer relationships make the monetary marketing budgets go down, which is a monetary gain for the company. It is really important to properly gauge your customers for their profitability. If you go after a customer that is not really profitable, you end up losing some of your investment into that customer. There can be monetary losses with some customers, if those customers carry some other form of value, for example reference value on the sector or in the country. Companies should move from only valuing the customer on more than only the transactions with the customer and the currency amount. There might need to be a way of measuring the engagement of customer for correct prediction of the customer value. Kumar (2010) proposes four components to avoid the overvaluation and undervaluation. The first is customers purchase behavior. The second is the referral value of the customer, as in how much can the referral be of incentive for your prospects. Third component is the influence value of the customer, as in how much can the customers' behavior affect the other prospective customers, like the "word of mouth" of the B2B world. The fourth and last component is the customer knowledge value, It shows how much value can be gained from the customer feedback and suggestions. (Kumar, 2010. Venkatesan, 2004. Gummesson, 2004)

One of the largest trends today in marketing is sustainability and greenness. Environmentally minded strategies can improve the competitive advantage and financial performance of the firm. Identifying and targeting the environmentally minded customers can provide further performance boost for marketing purposes. For this purpose the marketing's role in an environmentally friendly supply chain has to be heightened. Sharma (2010) provides three

different ways to do this: "the reduction of surplus supply of products, reduction of reverse supply, and internal marketing" (Sharma, 2010)

Complete customer relationship management requires a plan for regaining customers, though not many firms have a formal guide for reacquisition. Liu et Al. (2015) have developed a four step process of regaining lost customers. The first step is segmentation of lost customers with notable specifics of the company, for example the industry and country. The second step is to assess the reason for loss. Third comes development of reacquisition activities for the segments, loss reasons or even individual customers. Fourth and final step is the implementation of the strategies for reacquisition. The four step process gives companies a framework to create guides to policies for regaining costumers. (Liu, 2015)

2.6   Performance measurements in marketing

It is important that marketing actions are linked to financial results to better leverage marketing departments' position in internal strategic discussions. The C-level executives need to understand what is provided by marketing and how that affects their bottom line benefits. The measurements will also help marketing to be more efficient and to show which methods are effective. Figure 3 shows the different types of Return on marketing investment as defined by Stewart (2009).
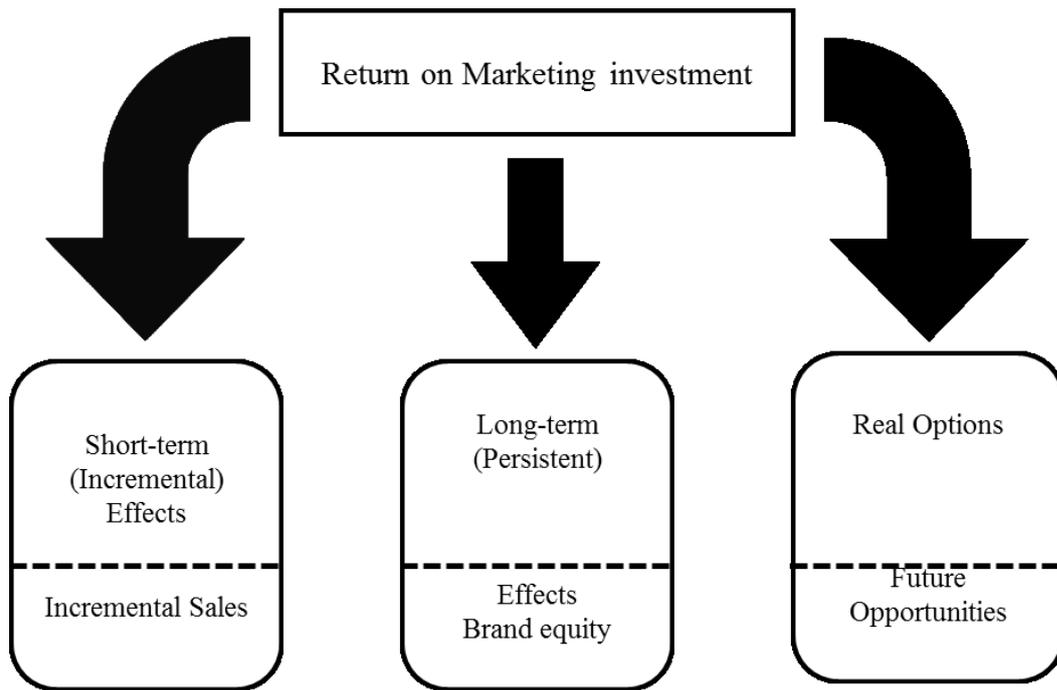
Figure 3 Returns on marketing activities (Stewart 2009)

The measurement and identifying of short term returns on marketing has been the easiest for organizations to do. It is intuitive and easily measurable, for example the increase in sales shortly after a marketing campaign. The incremental effects include other measurement types too, like increase in created leads, increase in customer contacts and others of suck ilk. The long-term effects are those that begin from the actions of the present, but are seen only in the future. They are a creation of strategic marketing over a longer period of time. An example of such returns is the brand value and positioning efforts in various companies. It is quite hard to measure long term effects before they happen and the linking of them to specific marketing activities is very hard. To properly analyze the long term returns, you need to establish a baseline point in time. Real options as a term has its roots in finance. Real options are future opportunities, which are created by marketing activities. An example of these is a price premium a brand can provide the company. They are opportunities and as such optional, but they have real value and real leverage in the market place. (Stewart 2009)

Marketing managers should be the ones to make the decisions on what measurements to use when looking at channel performance. Fewer metrics could be better to avoid too many non-

optimized measurements. It should have a clear logic to be aligned behind marketing actions for lesser internal conflict. There should be a mixture of both efficiency and effectiveness measurements and they should be clearly defined and separated from each other. Also the measurement should be seen as a portfolio of the whole measurement devices. Users have to understand that an action in one place can affect the performance of a select measurement positively, while affecting another one adversely, for example outsourcing of different functions. (Valos, 2006)

2.7 Summary of the literature review

The theory on Marketing Automation is very sparse. It has a lot of interconnected with the theories of digitalization of marketing, relationship marketing and marketing and sales funnels, but there is close to none theories on the subject in of itself. This seems to be in the process of being rectified, with new studies coming out on the subject in the newest journals. Table 2 shows the different angles for marketing automation theories and the parts where the theories are lacking.

Theory segment	Reference	Main points	Main gaps in regards to this study (if any)
Marketing Automation	System vendor documentation Greenberg, 2003	• Whole marketing and sales funnel mapping, a pre-requisite to utilize potential • Strive for personalization for customer experience gains. • CRM methods and integration. • Non-linear customer journey, because of the Internet	• How to really do any of these things? • How should personalization be conducted? • How to manage the non-linear customer journey? • When is the real person introduced into the fold?
Sales and Marketing funnel	Järvinen et Al. 2015 Harnessing marketing automation for B2B content marketing D'Haen et Al, 2013, Model-supported business-to-business prospect prediction based on an iterative customer acquisition framework	• Stages approach • Content marketing as a interest plaque • Intrest based contact selection • Behavior to gauge interest • Quick interest loss on leads from internet • Marketing Automation as a sieve for contacts	• Definitions of leads? • How to gauge the interest? • How to deal with lost customers? • How to deal with won customers? • When to give up on a contact? • The pass through from marketing to sales.
Marketing and Sales integration	Patterson 2007. " Marketing and sales alignment for improved effectiveness Homburg, 2008 Configurations of marketing and sales: A taxonomy	• A requirement for a working automation loop. • Better leads from closer relationship • Different styles of systems between departments	

		• Customer centric and

Table 2 Summary of the literature review

Internet in industrial Marketing	Karjaluoto et Al 2015, The role of digital channels in industrial marketing communications Chlebisova et Al, 2011, NEW APPROACHES TO THE BUSINESS-TO-BUSINESS MARKETING COMMUNICATION Lipiäinen et Al. 2015 Industrial branding in the digital age Greenberg 2010, The impact of CRM 2.0 on customer insight	• Consistent multilayed communication is important • Rising interest in soscial media • Efficiency increases • Customer relationship fostering • Brand building activities • Sales lead generation • Salesforce attidute important • Social channels same as in consumer marketing • Requirements to utilize different types of tools	• How to achieve any of these? • How to utilize social media to its fullest? • Efficiency vs quality?
Relationship marketing and valuing customers	Grönroos 2004, The relationship marketing process: communication, interaction, dialogue, value Liu 2015 A sales process framework to regain B2B customers	• Communication • Interaction • Value • Customer Lifetime Value • Greennes as a value creator • Four steps to regain customers	• How to apply this to the digital age? • How to create relationships without ever meeting the customer?
Performance measurement in Marketing	Stewart 2009 Marketing accountability: Linking marketing actions to financial results Valos 2006 An integrative marketing channel performance measurement framework	• Short-term effects: Sales • Long-term effects: Brand equity • Real Options: Future opportunities • Interconnectednes of measurements	

3   METHODOLOGY

There were many different possible academic ways to do this study. The first decision a researcher has to make is whether the research is going to be qualitative or quantitative. The purpose of the research is the guiding factor in selecting the research strategy. Quantitative research reaches conclusions with statistical analysis and, importantly, statistical testing of the results (Hirsijärvi et al. 2007, 136). Qualitative research methods aim to understand the point of view of the actors in a situation and the processes (Hirsijärvi et Al. 2007, 136). The secondary data of the study is statistical and will be analyzed using statistical methods, which is indicative of a quantitative research. The aim is to look at actors in the situation and how their processes could be improved, which has the characteristics of a qualitative research. These things put together make the current research with the mix of quantitative and qualitative data used a qualitative case study.

There are a multitude of strategies of conducting research. Mixing of the quantitative and qualitative research methods excludes purely quantitative or qualitative methods away from the selection. Yin (2003) puts forth four actors when case study style research should be considered: (1.) The study is trying to answer questions "how?" and "why?"; (2.) You cannot affect the behavior of actors; (3.) when you think that conditions in the context of your study are relevant to the phenomenon; or (4.) the phenomenon cannot be distinguished from the context. Because our focus in this study is to answer "how?" and "why?" questions, and the conditions and their context is seen as important, case study approach is chosen for the research. Case study style research focuses on the characteristics of a phenomenon and aims to describe it and its more fine details. Case study studies an individual or a group of individuals, and it is interested in how the individual acts in their environment. The data in case studies is usually collected by multiple means. These data collection methods can be interviews, surveys, observations and statistical data. (Hirsijärvi et Al. 2007, 128-131, Yin 2003)

The first step in the study was mapping out the current workings and processes in the marketing and sales funnel. These include the system transitions from marketing to sales and some information transfer, but for the purposes of this study the finer workings of the systems and

the integrations is not examined. The current system was mapped from internal documents, working with the systems and observations of the systems intricacies.

There are two different types of data used in this study. The primary data is collected from semi-structured interviews with four marketers and four salespersons inside the company. Semi-structured interview was chosen for the freedom and flexibility the style gives the interviewer, he can react accordingly and ask follow up questions. Interview situations should be actively steered to facilitate talk about relevant subjects. The interviewer has intricate knowledge of the subject and the organization and as such has the ability to react to the changes in the flow of the interview without interjecting their own opinions. The interviews were designed to be free flowing, with additional questions from the interviewee added into the interview, if and when the need arose. (Holstein et Al. 1995, p.41)

The marketers were selected for their expertise and their familiarity with the system functions and the market in question. The marketers work daily with the systems in place and plan the usage of the systems. The sales personnel are those that work in the market, use the sales systems of the company daily and are those that have hands on knowledge of the customers and their needs. The sales personnel are all sales managers working on different aspects of the business and with different types of customers. The semi-structured interviews were different between the two different departments. Appendix 1 and appendix 2 show the interview questions that were used with the interviews. In Table 3 the position of interviewees and the length of the interviews are shown.

Table 3 Interviewee positions and interview lengths

Interviewee	Position	Interview length (min:sec)
Marketer A	Marketing Specialist	38:41
Marketer B	Marketing Specialist	46:03
Marketer C	Marketing Manager	72:15
Marketer D	Marketing Specialist	45:52
Sales A	Sales Manager	42:42
Sales B	Sales Manager	40:22
Sales C	Sales Manager	58:49
Sales D	Sales Manager	31:46

The secondary data is gathered from the CRM system used in the company. The secondary data has over 500 data points with teach of them containing some descriptions and text about the sales process. The CRM data is the lost opportunities from the beginning of 2013 to the present day. It shows the number of opportunities lost and why they are lost. There is also some lost opportunities that do not have the lost reasons listed. If it was possible to piece together the reason from other data on the opportunity, then the closed reason was added, but if it was not then the opportunity was disregarded. The data is statistical in nature, but it contains the actions of the salesperson with the possible customer.

3.1 Data analysis

The interview data was coded through open coding and then axial coding. Strauss & Corbin (1998) define open coding as "*The analytic process through which concepts are identified and their properties and dimensions are discovered in data*". Open coding has five terms that explain parts of the coding process: phenomena, concepts, categories, properties and dimensions. Phenomena is the central ideas from the data, could be seen as the theory. Concepts are the representations of the phenomena in the data, they build the theory. Categories are the concepts that are in support of the phenomena. Properties are the defining characteristics of a category. Dimensions show the variation in the characteristic in a category. In the axial coding phase the text is read again, with the categories and concepts from open coding as a bias. The aim of axial coding is to confirm your open coding categories and concepts and to examine their relations to each other. The coding for this study is presented in the Table 4 (on page 27.) (Strauss & Corbin, 1998 p. 101 – 143)

The primary data, interviews, were transcribed word for word from the audio recordings of the interviews. To make the interviews more anonymous for the researcher all names and identifying information was stripped from the transcribed texts. Open coding begins with the conceptualizing the important actions or interactions. In conceptualizing the data is broken into smaller parts and given names that represent a group of these parts, a category. Categories were decided with the purpose of answering the research questions. The categories dimensions and properties were defined. After the concepts and categories were found the axial coding took place. The transcriptions were read again, with the open coding categories and characteristics in mind. The answers were sorted into the categories with sales personnel's and marketing personnel's answers clearly separated from each other. Once the interviewees' answers were categorized they were analyzed with marketing and sales personnel's answers regarded as the opposite sides of a discussion. The categories of answers were the same for the two different interview groups to create parity between the two groups and to express the views the groups have on the subjects. (Strauss & Corbin, 1998 p. 101 – 143)

The secondary data was numerical and text data gathered from the CRM system. The CRM system is mostly used by the sales personnel and as a part of it they add categories for closed reasons. Reports and pulling the data was done through the CRM systems own report generation tools and the data gathered was then analyzed in more detail in statistical software. The data was incomplete in some parts and some data strings were ruled out of the analysis on the basis of wrongly or incoherent information. The closed reasons are used as the coding of the data. The secondary data was analyzed by trying to find larger categories for why the customers are lost, with Liu et Al (2015) groups for lost customers used as a basis for the categories. After the categories were found these were analyzed in which portions of all the lost contacts are from which category. The Figure 4 shows the steps taken in the in the research process for literature review, both data-sets and the analysis of those data-sets.
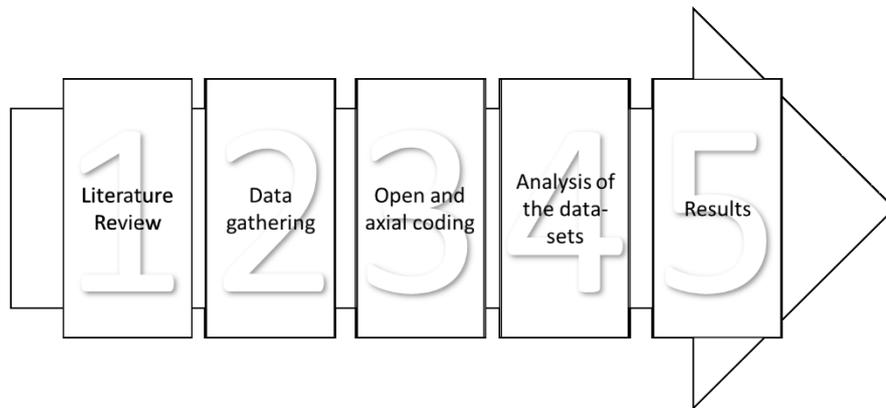
Figure 4 Research steps taken

4 FINDINGS

The findings of the data analysis will be gone over in this section. The open coding portion of the interview analysis revealed five categories. These categories are: Problems with the current funnel, Good things about the current funnel, Improvements to the funnel, Communication between departments, and Communication to the customers. There are also sub-categories for some of the categories. Problems with the current funnel category was defined by negative comments aimed at the current funnel and where it is lacking. Good things about the funnel is the category where the positive aspects of the funnel, from the interviewees go. Improvements to the funnel category contains the suggested improvements form the interviews. They are parts of the funnel where the interviewees clearly stated that they would like change or improvements to occur.

All of the previous three categories were divided into sub-categories, which are strategic, technical, collaborative, lead definition and lead transfer. Each of the sub-categories helps sort the aspects of the answers further into their rightful places. Strategic, technical and collaborative pertain to the parts where there is clear indication that the reason for something is in the strategy,

technical side or the collaborative communication between the departments. Lead definition sub-category is for the definitions of prospective customers that enter the lead stage and what is the difference between the contacts in the lead stage and in the previous stages. Lead transfer sub-category contains things having to do with any aspect of the lead transfer, whether it is from marketing to sales or vice versa. Communication between the departments is its own category and it contains things pertaining to the answers which show where the communication is lacking and where the communication is good between the departments. Communication with the customers' category is defined by anything that has to do with communicating with customers, from the planning of the communications to the execution of the automation of the communication. Table 4 provides a summary of the categories and their definitions.

Table 4 Summary of answer categories.

Category	Definition	Sub-categories
Problems with the current funnel	Negative comments of the current funnel.	1. Strategic 2. Technical 3. Collaborative 4. Lead definition 5. Lead transfer
Good things about the current funnel	Positive aspects of the current funnel.	1. Strategic 2. Technical 3. Collaborative 4. Lead definition 5. Lead transfer
Improvements to the funnel	Clearly stated improvements and changes.	1. Strategic 2. Technical 3. Collaborative 4. Lead definition

	5. Lead transfer
Communication between departments	Communication between departments is either good or bad.
Communication to customers	Anything that has to do with the communicating to customers

The secondary data provided insight in to the normal sales processes through the logging of activities sales personnel did on the sales records. The insight came in handy when analyzing the current sales funnel and looking at the types of answers interviewees gave on it. The numerical side of the secondary data was used mostly for the statistics it provides on the leads and opportunities exiting the funnel. These are customers that have reached the stage in their buying cycle where they're already talking to a sales person, and might be purchasing systems or instrument in the near future. The numbers and the comments the sales personnel used in their lost opportunities provide insight to why opportunities exit the sales funnel and what could possibly be done to limit this falling out.

4.1 The current marketing and sales funnel and its problems

The interviewees from both departments agree that the marketing and sales funnel in the company is almost like two different funnels with marketing and sales separated into two their own. There are mediating departments between them that work in slightly different functions, but for the departments in the fields selected for this study the rift between marketing and sales is readily visible. The sales organization especially is divided into different types of selling organizations, that have different levels of interaction with marketing and marketing has with them. There is also technical difficulties in the way of producing quality revenue performance management metrics for the whole combined funnel, which is more profoundly stated from the marketing side. Also tying the two systems into the ERP system in use at the company can be

difficult. Figure 5 shows the current stages of the marketing and sales funnel.
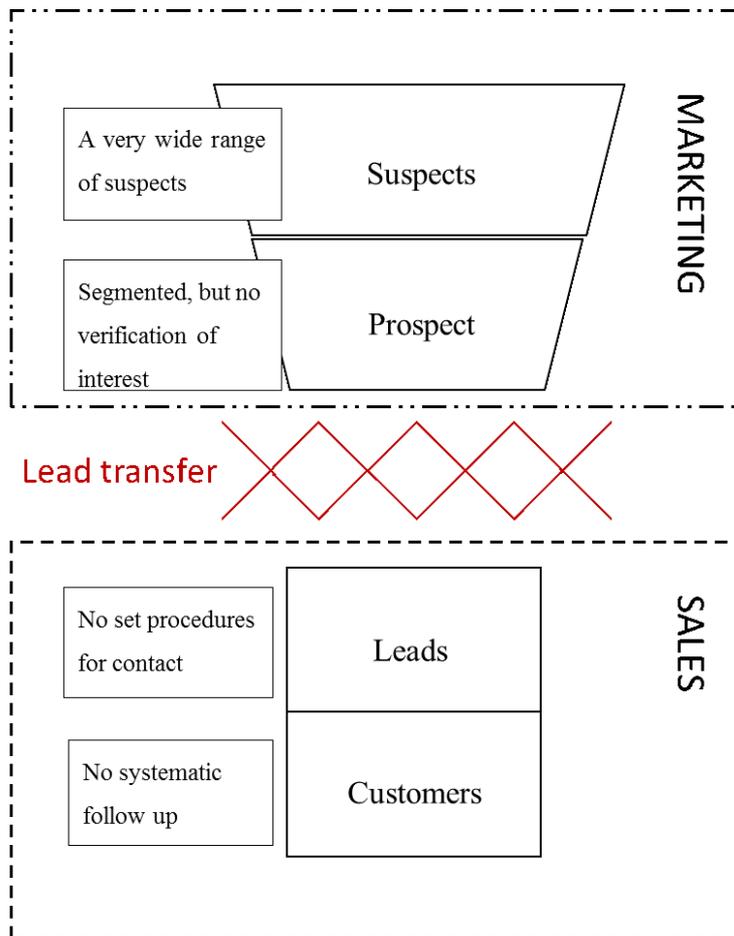
Figure 5 Current marketing and sales funnel operations

From the interviews the current processes were revealed. The process in the company has several different stages and can be roughly translated into a marketing and sales funnel. Suspects are gathered through different ways. Events and third-party ads are the main outside sources for suspects into the marketing system, but most of the suspects come through the marketing systems own forms on the company's own website. These forms are basic questionnaires for information about the suspect, with fields for name, industry and email among others. There are two basic types of forms: a direct request for quotation form and more general information forms. These information forms are used in conjunction with some content offering for the customer for example webinars, whitepapers and blogs. The company produces a lot of content for the customers and all the interviewees agree that this content is valuable marketing material for the company, with one marketing interviewee exclaiming "*The content*

we produce right now is great. We get a lot of positive feedback from the customers and our sales people on the content we produce." Also the interviewees state that there has to be a matching of value between the value of the content and the value of the information the company askes for that content. This shows that the customers recognize the value of their information and understand the finer workings of the new mediums of marketing. There is not really a way of limiting the range of suspects, but every interaction with a customer is considered a suspect. This gives the company very large segments that do not have proper factors to narrow them down. One marketing interviewee stated that it does not let them focus their marketing messages: "*The fact is that we get many contacts with too little identifying information to segment them properly. If we receive a number of contacts that are in the totally different business, B2G versus B2B for example, it makes it really hard to communicate with them productively.*"

The prospect stage in the current system consists of very basic segmenting of the mass of suspects. They are segmented on basic information they give including country and industry, but there is no verification of interest and the current Lead Scoring methods in use are basic in nature. Lead Scoring does not have different values for different types of basic forms or different parts of the website. For example the front page of the company's website is as valuable, for Lead Scoring, as is the specific product page. "*We ask for too much information on our forms. We ask for everything upfront, but we could do it by asking for information little by little as the campaign goes forward*", a marketing interviewee stated about additional problems with the forms. This was also agreed by other interviewees. Interviewees also state that there are many false positives from students and others that are not ever going to buy. The campaigns that are utilized currently are mostly one off email campaigns, with invitations or other contents in those emails. There is not much of personalization of emails in use, though the recipient's name fields are automatically populated. After the prospect stage the lead is transferred to the sales department and their CRM system.

After the lead is transferred to the sales teams CRM system, it is placed in a queue that are based on the desired segments. Some information about the leads journey in the marketing part of the funnel is shown in the CRM system, and the specifics are somewhat readily available to

the sales person. There is not any set procedures for lead contact, for example there is not a time frame in place for a lead and some leads can stay in queues without ever being contacted. "*This is a huge problem we have in our lead queues. There are some queues where leads just sit and wait for contacting, and these are valuable leads that have even shown interest.*", an marketing interviewee stated. This was also commiserated by a sales manager saying that "*Some queues are full of leads to be contacted [...] This is where the manager has to step in and be a manager*". Also some leads are junk leads that go through all the way to the sales team and are not easily distinguishable from the real leads generated from the marketing automation system, as a sales manager stated: "*Some of the Lead Scoring leads are not really leads, but this has gotten better during the time we have had this current system.*" After the sales team is done with the lead there is not any reporting back to the marketing automation system and there is not any re-entry loop for customers. The marketing has close to no information on people that have bought from the company before and so they cannot do any after sales activities easily. "*Currently we cannot get information from [company ERP] system to our marketing automation system. Also that is the only place all our sales are logged.*" a marketing person stated about the divide in the different systems. They can get some of the information from the ERP system, but this is cumbersome. Also small purchases are not recorded in the company's CRM system, which creates problems where people have spent a large sum of money with the company, but are put into re-engagement nurturing programs by accident. Figure 6 shows the data flow between systems, with the customer information mostly flowing from the marketing automation system to the ERP system through the CRM system. There is not really communication between the CRM system and the marketing automation system, but there are various analytics available through the business intelligence system, that is directly tied to the ERP system. These analytics can be used in conjunction with the information from the marketing automation system on customers and leads, but this method is not intuitive and requires a large amount of time to complete. There is partial product data flowing from the ERP and CRM systems to the marketing automation system. It's classified as partial as it is not used optimally and it is not on every product and every purchases. There are cases where customers that purchase regularly are treated as if they have not purchased at all and in some cases as if that they do not have any interest in the company. This is a huge problem for the company as there are some repeat customers that have gone into automated re-engagement campaigns for customers that do not have any actions or contact with the company.
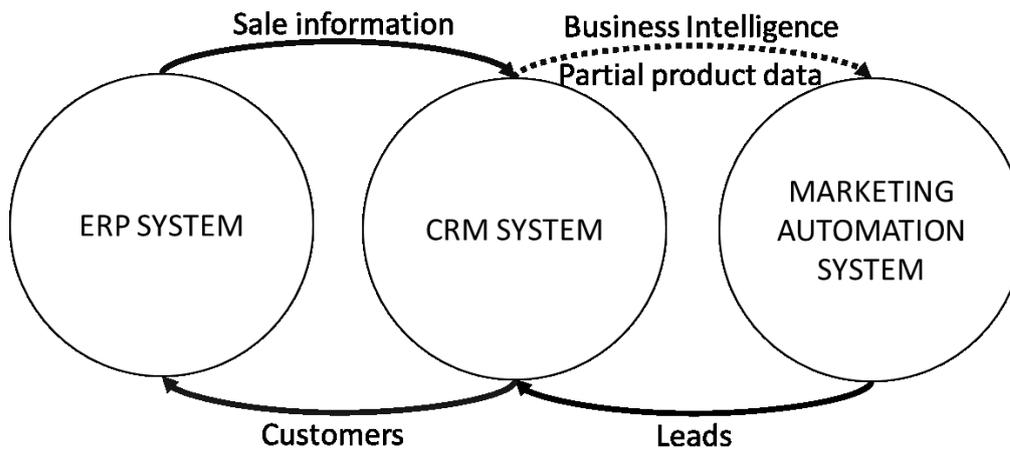
Sale information　　Business Intelligence

Partial product data

ERP SYSTEM　　CRM SYSTEM　　MARKETING AUTOMATION SYSTEM

Customers　　Leads

Figure 6 Data flow between the systems

4.2   Good things about the current funnel

The interviewees all stated that the company has multiple touchpoints with their prospective customers. The company has great search engine advertising and optimization to ensure that the customers are funneled to their rightful places on the website and inside the marketing systems. A sales person stated that: "*When I search for continuous monitoring systems our product or our website is in the first ones to show up, which is very important. [...] This is the first step prospective customers do when starting their projects.*" This is an area where every interviewee stated that the company is doing enough and doing well.

Another part that the interviewees feel that the company is great at is the content production. The company has a lot of great and quality content. Also the nurturing programs built around the content are elaborate and provoke positive customer responses. "*We create lots of content and bring in lots of soft leads and we do not let those leads rest, but we put them through elaborate nurturing programs*", stated one marketing person. Another one attested to the quality of the company's content by saying that "*We are known as a company that has good educational content, good technical content and resources for people to utilize.*"

The sales personnel that were interviewed commented on the changes that have happened in the systems and in between the systems. "*Earlier on I felt like there were a lot of just leads that were not leads that were just there for the information. This has changed for the better at least in the segments I handle*" said a sales person. Sales personnel also commented positively on the technical systems that are already in place and some of the integration has been built already.

4.3   Future of the funnel

The one thing every interviewee on both sides of the marketing and sales gap is more personalized messaging and contact. "*Providing a more targeted message at the right time*", one sales person stated. This personalization should be achieved more and more when the prospective customer goes deeper and deeper into the sales funnel, as the company gains more information about the customer and the interests that the customer might have. Personalization is also one of the aspects where marketing automation could be of great importance, both the theories and interviewees agree upon this point. "*I think we need to move in that direction of direct person personalized messages […] And I think that marketing automation would fill that gap*" said a marketing person when talking about personalized messaging. The adaptation of personalized marketing programs and personalized nurturing programs would need a change from the strategic way marketing campaigns are planned. "*We usually do our nurturing programs content first and not design the nurturing program first and then the content to fit the program*" said a marketing person, and it is indicative of a need for change in the way how automated programs are planned now.

The thing both departments want to see from the lead handling automation is gauging customer's interest in the funnel. "*For introduction we do not need much information, but to pass them along the funnel we need more and more mainly about their interest*" a marketing person said where as a sales person resonated the same sentiment in regards to gathering interest information "*You have to know that it is a truly actionable lead. Understanding if there is potential for business or if it just wasting our time.*". Other things the interviewees wanted to be gathered are customer profiles, for example is the lead a decision maker or a technical user. To do this the interviewees from the marketing side suggested that content and different parts of the website would be given different point values, for example a white paper of a certain

application would be seen as more interest than just visiting the front page. Purely information all the interviewees want some contact information, with phone numbers being seen as the most valuable information. "*If you give me your phone number I am going to call you, if you do not pick up I tell you that I'll be emailing you about it so you can decide if you're going to call me or reply to my email.*" said a sales person on the value of phone numbers. From the marketing departments' side the information they want from sales is information on the people sales is talking to and who the people are that marketing should be talking to, "*The correct person for the correct opportunity for future activities*" a marketing person summarized. From purely statistical standpoint marketing personnel want more information on leads generated and how the leads are doing in terms of sales. "*We should be able to tie sales and leads to events for yearly budgeting reasons.*" marketing person stated about the information they would want from sales. One other thing marketing personnel would want is feedback on both content and sales, as an interviewee stated that sales has the best view of what really are the problems customers face and what are the "win" factors for products.

One place where there is great disaccord between the two departments is the definition of a lead. There is even subtle differences between individual interviewee's definitions for leads. This shows that the organization does not have a set definition for a lead. The point on which every interviewee agrees upon is that to be categorized as a lead the customer has to have shown interest the way that interest is defined varies between the interviewees. Most of the sales side of interviewees put the leads into different categories, with different classifications for leads. One marketer puts the leads in to two different categories: "*There is two types of leads marketing and sales leads. Marketing lead is anybody that expresses any interest that gives us a path to engage them. Sales lead is anyone who is expressing an intent to purchase. This could be determined from customers' behavior and from their action*". The determination of interest is a point of contention between the departments. Some say that the interest could be determined from their behavior, others state that there has to be a clear indication of interest from the customer, and still one interviewee states that there has to be just the inkling of interest for sales to start working on the case. There needs to be agreement and discussion between the departments on what defines a lead. This definition does not have to be set in stone and can change if the leads generated are not of value. On the lead handling side of the automation process, marketers and some sales personnel want set guide lines for lead handling after it is

passed from marketing to sales. With different information attached to leads, should trigger different actions from sales in a set timeframe. The timeframe should be strict enough to catch the small interest a lead has when it is transferred to sales, before that interest vanishes. Also there should be involvement from the marketing side even after the lead is transferred to the sales. A marketer summarizes the hopes for leads and their handling as: "*We need an agreement on what is a lead and what is an opportunity. Also we should have some guidelines in place what to do when a lead goes from marketing to sales, like first contact should be in 24h or whatever it is.* "

After the customers have bought from the company there is a lot that could be improved. Currently there is not any organized contact or any recognition of the fact that the user has bought from the company on the marketing departments side. Both marketing and sales agree that the customers should be treated differently, because they have bought from the company, and that there are opportunities for future sales with these customers. A marketer illustrates the first contacts that the new customer has with the company by saying: "*You make a really big deal about the first contact. […] Here is what you get because you chose to work with us. Our offerings and tools to make their life easy. Maybe even have a tour of the company. Showing our services and other products, but I would not push that. You'd like the customers feel that they've made the right decision.* ". The sales personnel agree whole heartedly with the sentiments put forth by the marketers, but they have a point from their practical experience: "*But the thing is people want to talk to their sales guy, which is bad for the sales person. We should try to move them away from the sales person to a customer rep, because the sales person is focused on his next sale or opportunity.* "

Feedback is the part of the communication both departments agree that is missing. Whether it is feedback on the action of the other department, the leads generated from the marketing to the sales, or the feedback on content generated. A sales person commented "*What is important messaging, especially what is important on the website*", when asked about where the communication is lacking between the departments. The statistical feedback on leads and won customers to be tied to campaigns is something the marketing personnel would want, to better budget and plan their marketing programs in the future. "*Definitely the Lead transfer and the*

feedback on the Leads. When the Lead is created to sales and then sales closes or moves the Lead forward in funnel, we as marketers should know that. […] This should be automatic and we would get some insight into the speed a Lead goes through the marketing and sales funnel, to tune our process.'' a marketer stated in regards to the information flow in the systems. The same marketer went on to say that: "*Every transaction should come back and be recorded in the marketing database so that we can use them in our planning, and that we can start the onboarding campaigns with the new customers.''*

4.4 Communications to customers

When communicating with customers the interviewees had differing things to say. Every interviewee stated their like of honest, friendly and professional communication, and would want that same type of communication to exist between their organization and the customers. One marketer would want there to be easy contact points and the promotion of them to customers, so that the customer knows where to contact if they have problems. "*When the purchase is completed open and thorough communication is important, about the delivery, what to do after the delivery "first steps", and if the customer has problems with the product down the line, where to contact. The birth of trust between the two parties is most important for a successful customer relationship and to build this trust active and thorough communication is the most important*", stated a marketing person. Sales personnel also agreed upon the ideas put forth in the marketer's statement. They state that they want there to exist trust between the customers and the company, and a way to do it is to answer customers' questions, even the "hard" ones. The interviewed marketers as a whole wanted the marketing message to be more focused on the customers' problems and the customer value the company's products provide. Also both departments agreed upon that the communication should bring the company to the forefront too, to promote the brand and the image of high quality and the real value of the products. "*What the company is all about. We have these quality steps and we have our own clean rooms. Showing stuff about our firm and showing why we are as good as we are. It helps people understand why our products might be a bit pricier than the competitors*" a salesperson stated about the message a customer should receive from the company.

4.5   Why opportunities exit

Opportunities are leads that have showed genuine interest and are being actively worked on by a sales person or a sales manager. There is a genuine distinction in the CRM system between the lead and an opportunity. The person handling the customer in the CRM system chooses to convert the lead into an opportunity. There are possibilities for the lead to drop out of the marketing and sales funnel before the conversion process, but these are not currently catalogued by CRM users and thus cannot be readily analyzed. When an opportunity is dropped out of the funnel the person handling the account should choose a "closed reason", though this is not enforced and there are still a number of closed opportunities that do not have a reason for a close. Closed reasons are pre-set options for the reason a lead is dropped. These reasons are numerous, but they can be categorized into three distinct parts: Customer action, offering action or company action. Customer action category is comprised of reasons where the reason for the closing is tied to the customer organization action, for example the project being on hold. Offering action category is for reasons related to the offering the company offers, for example that the price is too high. Company action is a category for reasons that are because of the selling company's actions, for example deciding not to bid.

Currently the workforce in the company that has not got any access to the analytics believes that most of the opportunities exit, because of the price is too much for them. The analytics and interviews do not support this assumption. Most of the opportunities leave the funnel because of losing communication or because of a customer action. The single reason that is attributed with most of the leaving opportunities is the customers' problems with their project, close to 40% of the closed opportunities analyzed leave because of this reason. The interviews reveal that usually it is that the project is put on hold or that it is abandoned all together. Project abandonment usually is caused by the customer not understanding what he really wants or needs and realizing that their current system is as good as their budget allows. One interviewee stated that the customers that have gone through to the sales person know the value of our product and usually are not "sticker shocked".

All interviewees agree that there has to be strategies and programs in place to contact the customers automatically, with different types of lost reasons going with different strategies.

The most important thing, the interviewees agree, is that the channel to the customer is kept open and the company is kept fresh in the potential customers mind. A marketer sums up the different ways the organization should react to customers and them dropping out of the funnel as: "*The critical point is to understand why we lost. There is many reasons from pricing to the offering and just not liking us. You still have to take some steps to stay in contact with the customer, but there needs to also be a point where we do break away, where we do stop. We should have points for customers, potential customers and people who ca not be customers. The last is not unimportant, we have to give them information just on the off chance that they someday might do business with us.*"

4.6 SUMMARY OF FINDINGS

The interviews show that there are large problems with the current funnel, but there are shining examples for the future too. One thing that does not show in the findings or the coding is the palpable excitement almost all of the interviewees showed towards the subject and the possible improvements Marketing Automation could provide to the company. This is not overtly noticeable in what they said, but the tone of the interviews show this excitement clearly. Table 5 shows the summary of the findings.

Table 5 Summary of Findings

Findings	Summary
Problems with the current funnel	No set definitions for leads, No guidelines for lead contact, Data flow between systems problematic, No re-entry loop, No proper feedback on leads, Gap between sales and marketing is noticeable, when talking about contact handling. Every piece of content is valued the same, Asking too much information upfront, Logging of small deals, Ability to segment the contacts, Data integrity issues
Positive aspects of the current funnel	Many different points of contact with the customers, Technical integration mostly in place, The search engine optimization is done well, Great quality content, Some improvements on lead quality since inception, Efficiency gains from using systems
Future of the funnel	More personalized messaging and contact, "Providing a more targeted message at the right time", Planning from Content first to nurturing plan first, Lead quality determination based on their behavior, gauge their interest. Pass on to the right department in sales, Profiling of different types of customers, Statistics from sales to marketing and vice versa, Interaction in planning and messaging between marketing and sales, New customer handling, Feedback

| Why opportunities exit | Three different categories: 1. Customer Action, 2. Offering Action, 3. Company Action Largest part of closed opportunities are in the Customer Action category, No sticker shock, when discussions with sales have begun. |

5 IMPLICATIONS OF THIS STUDY AND ANSWERS TO RESEARCH QUESTIONS

There are obvious problems with the current funnel that are mostly from operations side, with some technical difficulties arising from integration and the technical know-how of the users. The most glaring issues are in the customer hand-off between marketing and sales, this is also where the strategic communications is lacking.

The definitions of leads should be clearly defined between the departments in any organization looking to marketing automation and revenue performance management to aid their customers purchasing funnel. Without these the statistics used in the revenue performance management are close to useless, because there are no set determinations for the basic part of the static. In this case the most probable solution would be to split the lead stage into two: Marketing Lead and Sales Qualified Lead. This would give some leeway in the determination of interest, with Marketing Leads being the ones where the company is still unsure of the buying intent of the contact. Also there should be continuing feedback on leads generated from the marketing automation and other methods used. This feedback should be both statistical, for example revenue per generated lead or revenue per dollar spent on campaign, and verbal and written opinions from the sales team. The need for twofold feedback is important for two reasons: First you can use the feedback in strategic decisions, for example should we go to this reoccurring event if the leads from last time were of low quality? The second reason is that you can compare the feedbacks to each other, thus increasing the trustworthiness of the results of the feedback.

With the defined leads there also needs to be set definitions of handling the leads on both sides of the organizational gap, or all the activities and definitions become useless. The leads generated in any method are time sensitive on their interest, but there should be different timeframes of contact depending on the way the lead is generated. Direct contact from the

customer, whether it is from a request for pricing form or a phone call, should have the highest priority and they should be handled quickly. Even the Leads generated from their behavior on the website are time sensitive, but they are not as urgent as the direct contact leads. An additional and somewhat hidden reason for clear and enforced rules for lead handling is the benefit to the feedback. If the sales personnel have to go through most if not all the leads generated, they have a direct incentive to increase the quality of the leads.

The strategic planning of campaigns could be more customer centric and designed with the program and the programs aims first, and then focusing on the content needed to get this result. Also campaigns should try to include sales persons in the planning stages, where applicable. The Marketing personnel should still be the ones to lead the planning and strategies because they have the expertise in marketing, but they should still be open to the ideas from sales. Sales personnel are the ones that deal directly with customers on a daily basis and as such have more through view of the customer's problems and ideas for possible avenues of new revenue. The planning should also include some personalization of messages and possibly content and the personalization the order of which type of content goes to the customer first.

Personalization of the messaging in itself is a very large subject and is somewhat out of the scope of this study, but some conclusions arise from the data. A thing that should start the personalization is profiling the contacts and prospective customers into different groups. An example of profiles are shown in Table 6. This example is based on the researches expertise not on any data gathered in this study:

Table 6 An example of profiles

Name of category	Definition
Decion Maker	A person who has direct control of the purchase decision. Might be a part of the group deciding.
Influencer	A person who influences the purchase decision, but does not directly make the decision.
Workforce	A person working for a company that is a customer or might be a customer in the future. Might be an end user of the product. Might upgrade to Influencer or Decision Maker in the future.
Non-affiliated workforce	A person that is not currently in a company that is a customer or might be a customer. Might have a position in a customer company in the future.
Interested Layman	A person that is only interested in the technology, products or the educational content. Might be a student and might have a position in a relevant company in the future

Also there is a severe lack of contact and customer handling at the end of the funnel. There would need to be campaigns and procedures for the onboarding and the communication with customers that have bought from the company. This would create avenues for future development of the relationship with the customer in question and might provide the company with more revenue in the future and keep the customer base more stable. The onboarding campaigns could be how to contact service, where the product is going and some interesting tidbits about the product in question. With these the relationship would be open to cycle selling and up selling products and services in the future, and the customer would have the company at the top of mind. Also the companies looking at automation have to consider the contacts that have dropped out of the funnel at different times and what to do with them. From the interviews

the key thing that everybody thinks helps with dropped of contacts is keeping the communication open. In the world of business to business sales the purchases can be project or funding based and as such can take months and even years to complete, so it is important to keep the communication going for the time in between to capture the interest of the potential customer. Even if you cannot sell them the product they want now, you might be able to sell them something in the future.

Figure 7 shows the framework for a marketing and sales funnel for the case company. It mimics the one put forth by D'Haen et Al. (2013), but with a few key differences. In the framework the Lead stage has been split into three different categories: Marketing Lead, Sales Lead and Opportunity. The key difference between Marketing Leads and Sales Leads is the interest or intent to buy on the contacts side. Opportunity is a stage where the contact has received a quote or has been worked on by a sales person for a while and the interest or intent to buy is palpable. The other key difference is that the D'Haen et Al. (2013) framework only has a re-entry loop for customers, but does not have one for the lost deals. In the framework there are feeders, the places where a contact drops out of the funnel, and inserters, places where the loop loops back to the funnel, for the lost deals loop. The lost deals loop is only applicable between the stages of Prospect and Opportunity, because a customer goes to the other loop and the drop-out is never reverted to a suspect
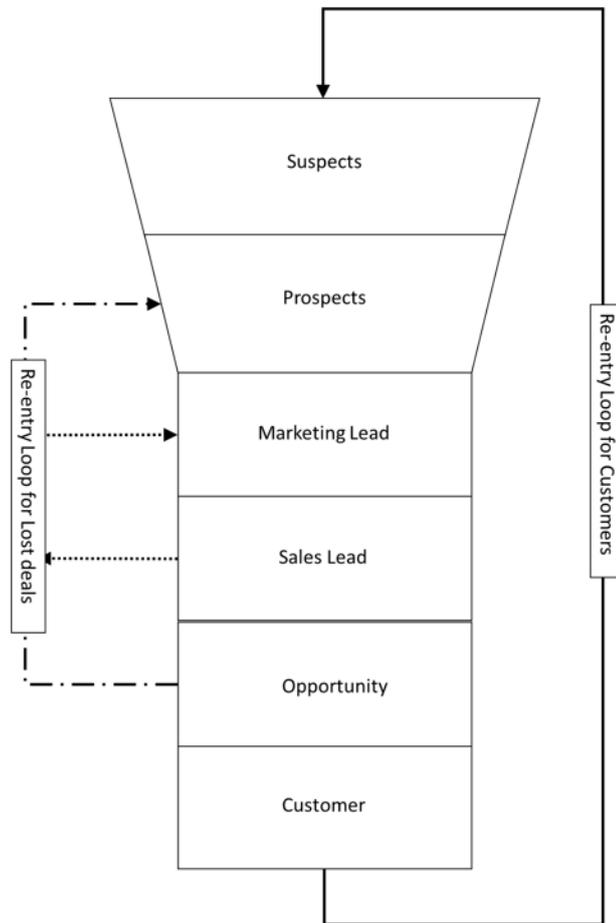
Figure 7 Framework for a Marketing and Sales Funnel

The research questions in this study were based on the gaps in the literature. The main research question was as follows:

1. How to use Marketing Automation for Revenue Performance Management?

This is further dissected to different aspects, with the most prevalent ones pertaining to the problems identified in the beginning of the study.

1.1 How could Marketing and Sales benefit from Marketing Automation?
1.2 What analytical data should pass through between the departments?
1.3 Why do contacts drop-out of the Marketing Funnel?

The findings of this study answered these questions in a satisfactory manner. The answer to the first sub-question (1.1) is in one word, greatly. They could benefit from the better leads and thus better revenue generation. Also marketing automation as a tool needs marketing and sales

to be aligned, which would be considered a benefit from the customer's perspective. The flowing statistics between the systems and departments in terms on feedback on leads and campaigns alike, might give efficiency gains for both departments. One aspect where marketing automation would not benefit the users is from a lack of understanding of the system and its benefits by the users of the system. Also there might be a drawback from the loss of more personal contact with the marketing automation system. This drawback is thing to keep in mind when balancing the amount of automation, and also when involving a real salesperson in the communication.

The answer to the second sub-question (1.2) could be summed into: All. Everything you can know about the customer and use in the marketing and the analytics of the funnel is important, and with computational systems there should not be any reasons for the data to not flow. What is important, however might have been the better question. From the marketing to sales data flow one piece of information rises from the data in this study, interest. Sales and marketing alike want to have the leads interest and what is the object of their interest. From the sales to marketing data flow is revenue in a way that can be tied to the campaigns and marketing activities. Also marketing needs to have data on their leads and what happens to them in the sales parts of the funnel.

The answer to the third sub-question (1.3) is the most company specific one. There are three categories of reasons for the contact to drop out of the funnel: Customer reason, Offering reason, and Company reason. Customer reason is a reason arising from the customer company. The most of the reasons have to do with money not being available for the customer to continue with their purchase. Offering reason is a reason arising from the offering of the selling company. This can be anything to do with the offering, from the price to the quality and parameters of the products itself. Company reason is a reason that has to do with the selling company. These are reasons where it is a clear decision from the company to abandon this contact for now.

6   LIMITATIONS AND FUTURE RESEARCH

There are noticeable gaps in the literature in regards to marketing automation. First of all there is not conducted a large scale "generic" research in to the basics of the marketing automation. Secondly there is no framework for the marketing automation or the adaptation of the marketing automation. Thirdly there is also no set definitions for terms used in the marketing automation or there is not any guidelines for companies to define the terms themselves. Also studies in to the funnel management and statistics aspect that the marketing automation provides are close to non-excitant. All of these gaps are somewhat where this study provides some insight, with varying levels of success. In the basics of marketing automation, this study is lacking in the large scale investigation of the subject, but it provides some of the basics of marketing automation, whether it be trough the literature review or the findings. The main gap where this study provides value is in the framework and steps to take in the adaptation of marketing automation, through the suggested shifts in campaign planning and the involvement of both marketing and sales in the planning of customer journeys through the funnel. The definitions and funnel management are also large gaps, where this study aims to provide some value. The definitions side in this study is more focused on the terms that should be defined between the departments and some of the terms that might be used only by one of the two departments in question. The funnel management side is shown more in the benefits of what marketing automation can do: provide lead analytics, better quality of leads, feedback on leads and information for budgeting purposes.

The possible limitations of this study arise from these five categories: limited number of research subjects, limited amount of interviews, geological and cultural limitations, limited previous research, and the inexperience of the researcher. The limited number of research subjects pertains to the fact that this study is focused only on one company and the processes of that company. The company in question might not, and most likely will not be, a sample of industrial companies as a whole, so generalization of this study is not possible without limitations. But some of the findings in this study, especially those of a more general nature, could still be used in other research keeping the limitations in mind. The limited amount of interviews might be a problem with the trustworthiness of this study. The interviewees also all

work for the case company and work in somewhat similar positions. This is combatted somewhat by the fact that the experience levels and jobs are not similar, even if their titles might be. The geological and cultural limitations arise from the fact that the case is concerned in a very small market and all the interviewees work in this market and are from the western culture regions, so there might be issues generalizing the findings into other markets. Especially the Asian market might be very different in regards to marketing automation. Limited previous research in combination with the other limitations of this study might prove that the findings of this small-scale study might be far off the mark, though the methodology and analysis uses proven methods and techniques. Last but not least one limitation of the study might be the inexperience of the researcher. The researcher does not have great experience from the academic research world and as such might miss or miss-use some information a more experienced researcher might not.

For future research the avenues of research in Marketing Automation are many faceted and the area could benefit from thoroughly researched and published studies. One avenue of research could be in personalization. The way how personalization should be done, how the profiling categories can be found, some general profiling categories for customers, and personalization framework for companies, are all possible avenues for research with possibilities to be used in businesses worldwide. As a part of personalization the profiling of customers could be a large area of study, with possible research questions being: What characteristics show a decision maker on the web?, How to collect the information?, and Who are the influencers? among others. There is also a need for a large general study on marketing automation. Especially interesting there would be a Developer versus the User-Company viewpoints to study. It would provide benefits for both the businesses and help future researchers with the basics. Also a point of interest would be to look at New-adopters versus Old-adopters to see how the feelings towards the systems change and to create some frameworks for the adoption of the systems.

7 MANAGERIAL SUMMARY

Marketing in a world of constant communication is a hard task, and so is trying to handle customer bases of thousands with ever stricter budgets for travel, communication and human resources. Especially after the 2008 financial crisis the marketing practices in firms have been re-structured for more efficient ways of contacting customers and for more efficient marketing technologies. Internet provides the mass marketing aspect of the marketing practices, and does not rule out traditional channels used in conjunction with it. Marketing Automation is a system that tries to produce the same level of relationships with customers or soon to be customers with more efficiency and less wasted resources. Marketing automation is a part of, and an enabler of, Revenue performance management or you could argue that Revenue performance management is the statistical part of Marketing Automation. Revenue performance management is a systematic approach to identify the drivers and blocks in for revenue in the marketing and sales funnel.

The revenue performance management is a tool to better the marketing's return on investment, which is where marketing automation can help, both in bettering the efficiency of the communication and relationships in the funnel and in providing statistics for budgeting and decision making purposes. Marketing automation can provide statistics on even the regular campaigns and programs that are not strictly a part of the set Marketing Automation programs. This study is aimed at creating a framework for Marketing Automation for Vaisala Group, which provides better analytical capabilities than those currently in use. This is achieved by studying the current practices and developing a Marketing Automation solution for a select part of the group that operates on a select market. With the framework Vaisala Group will be able to create better and more valuable leads in their marketing and sales funnel, and achieve efficiency gains from the automation of set tasks. There should also be a benefit in budgeting and analyzing what works in the marketing and what does not. For the purposes of this study the framework will be more of an overview, without going to specifics of marketing campaigns in question. The tradeoff of the customer from marketing and sales is seen as a constriction point and is given more of an emphasis in the study.

The research questions are based on the gaps in literature and practical challenges when companies are investing into Revenue Performance Management and Marketing Automation. The main research question is as follows:

1. How to use Marketing Automation for Revenue Performance Management?

This is further dissected to different aspects, with the most prevalent ones pertaining to the problems identified in the beginning of the study.

    1.1. How could Marketing and Sales benefit from Marketing Automation?
    1.2. What analytical data should pass through between the departments?
    1.3. Why do contacts drop-out of the Marketing Funnel?

The theories and academic research into Marketing Automation is currently almost non-existent. There are no theories on the adaptation of Marketing Automation, on what are the steps to take when your company is adopting Marketing Automation, and how should you construct the programs and campaigns for it. Marketing Automation combines many disciplines of marketing theories, because the nature of Marketing Automation is trying to comprehend the whole marketing and sales funnel and even beyond. There are a few pivotal parts in the theory of marketing automation: marketing and sales funnel, marketing and sales integration the use of Internet in industrial marketing, relationship marketing, customer evaluation, and marketing performance measurement.

The study was conducted using Case study methodology. The data was twofold: (1) Semi-constructed interviews with four marketers and four sales managers, and (2) data from the CRM system on lost deals. Semi-constructed was selected as a method for its free-flowing and adaptive nature. Data from the CRM system was statistical in nature, but it contained logs of sales activities and descriptions of the sales process. The secondary data contained over 500 data points. The interviews were transcribed to text and then coded using Open and Axial coding.

On the current marketing and sales funnel and its problems the interviewees from both departments agree that the marketing and sales funnel in the company is almost like two different funnels with marketing and sales separated into two their own. There is also problems with the data flows and the integration between the departments' own systems.

There is a wide range of suspects entering the funnel, from events, third party ads and the forms on the company's own website. The forms are in conjunction with a piece of content. One marketing interviewee stated that it does not let them focus their marketing messages: "The fact is that we get many contacts with too little identifying information to segment them properly. If we receive a number of contacts that are in the totally different business, B2G versus B2B for example, it makes it really hard to communicate with them productively." The prospect stage in the current system consists of very basic segmenting of the mass of suspects.

The prospect stage consists of programs to segmented contacts, but there is no verification of interest and the Lead Scoring methods do not have different values for different types of content. The current forms used in conjunction with the content also do not value the contacts information balanced with the content. "We ask for too much information on our forms. We ask for everything upfront, but we could do it by asking for information little by little as the campaign goes forward", a marketing interviewee stated about additional problems with the forms.

The adaptation of personalized marketing programs and personalized nurturing programs would need a change from the strategic way marketing campaigns are planned. The nurturing and other campaigns should be planned with a goal in mind and then fit the content into that program, and not the other way around. "The right message at the right time" a marketer summed up the aim for personalization.

Findings on the information pass through in the funnel tell show that both the departments want more. Sales personnel would want more information on the interest of the suspects before they are made leads and also they would want contacts that are real leads and not just people looking

for educational information. Intent to buy is a key factor for them. Marketing department would want information they want from sales is information on the people sales is talking to and who the people are that marketing should be talking to, "The correct person for the correct opportunity for future activities" a marketing person summarized. Also marketers would want all the information on all sales, to better utilize the new customers in their marketing.

There is not a clear definition on what is a lead currently and guidelines for contacting leads do not exist or are not followed. When asked on their definitions of leads most of the interviewees echoed the same sentiments: They are persons that show interest. One marketer puts the leads in to two different categories: "There is two types of leads marketing and sales leads. Marketing lead is anybody that expresses any interest that gives us a path to engage them. Sales lead is anyone who is expressing an intent to purchase. This could be determined from customers' behavior and from their action." On the lead handling side there is a clear need for a set guidelines. . A marketer summarizes the hopes for leads and their handling as: "We need an agreement on what is a lead and what is an opportunity. Also we should have some guidelines in place what to do when a lead goes from marketing to sales, like first contact should be in 24h or whatever it is ". After the customers have bought from the company there is a lot that could be improved with Marketing Automation.

On communication and content the interviewees as a whole wanted the marketing message to be more focused on the customers' problems and the customer value the company's products provide. Also there was a clear vision that the brand of the company should be brought out more in the messaging, especially in the early stages of the relationship.

Opportunities that exit the funnel can be categorized into three different categories: Customer action, Offering action and company action, with customer action being by far the largest category. Customer action consists of reasons having to do with the customers' project or funding. Offering action has to do with the company's offering and its price. Company action is a reason where the company itself decided to abandon the bid.

What follows are some managerial suggestions and next steps to take to create a better marketing and sales funnel, utilizing Marketing Automation. The suggestions are not ordered by importance. (1) Define what a Lead is. For example Marketing Lead, for interested with no intent to buy, and Sales Qualified Lead, for interested with an intent to buy. Also needed is clear definitions when the contact hand-off occurs between the marketing and sales. To define the Leads there also needs to be feedback on the Leads to improve the Leads continuously. (2) Guidelines for Lead handling. There needs to be set amount of time for contacting the lead, regardless of where it originates from. The contacting time can differ between the sources, for example Lead Scoring (behavior) could be 3 days to 1 week while direct contact should be contacted immediately or at the latest in 3 days. The guidelines and their enforcement would generate an incentive for sales to give feedback on the Leads. (3) The planning or brainstorming of marketing activities. The planning or brainstorming should involve more sales personnel. The marketers should still lead, but the ideas from sales are invaluable. They are the ones that are in constant contact with the prospective customers. Also the messages should be personalized to the customers and their markets. (4) Personalization of the messaging is also an aspect that should be looked into. It could and should be done on for segments, countries and markets, but companies should also think of creating profiles of their prospective and current customers. Here is an example of profiles for customer groups: Decision maker, Influencer, Workforce, Non-affiliated workforce, Interested layman. Statistics and direct involvement from sales is needed to make the groups to be of any use. (5) The systematic follow up on won and lost customers, for a better customer experience and return on investment. Onboarding campaigns, cycle selling and up selling on the new and existing customers. For the lost deals keeping the communication open is of utmost concern, you try to capture the project when it resurfaces or to capture their next project because they are spending money in the market.

APPENDIX 1. INTERVIEW GUIDE FOR SALES PERSONNEL

Interview question	Sub-questions
1. What do you think of marketing automation?	- What are some parts of the communication you would like to be automated? - What information should we collect, what information do you think would be useful? - What should the customers see of Vaisala in their first contacts? - In what ways could we regain customers/leads?
2. What do you think of the current method of gathering customers and lead handling?	- What do you consider a Lead? - What do you like of the current situation? - What would you change? - What could be improved? - What closed reasons would you add? - How should we handle customers that have bought from us already?
3. What would you want from marketing?	- What do you think should be done before the lead transfer from marketing to sales? - What information would you want when the lead transfers to Sales? - Where is the communication lacking between the departments?
4. What do you think are the most important parts of communicating with customers?	

APPENDIX 2. INTERVIEW GUIDE FOR MARKETING PERSONNEL

Interview questions	Sub-questions
1. What do you think of marketing automation?	- What are some parts of the communication you would like to be automated? - What information should we collect, what information do you think would be useful? - What should the customers see of Vaisala in their first contacts? - In what ways could we regain customers/leads?
2. What do you think of the current method of gathering customers and lead handling?	- What do you consider a Lead? - What do you like of the current situation? - What would you change? - What could be improved? - What should be done to customers after the lead/opportunity is closed? - What closed reasons would you add? - How should we handle customers that have bought from us already?
3. What would you want from sales?	- What do you think should be done before the lead transfer from marketing to sales? - What information would you want from sales on bulk opportunities / leads? - Where is the communication lacking between the departments?
4. What do you think are the most important parts of communicating with customers?	

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