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Master's thesis

A case study: marketing automation in digital multi-channel customer experience management

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ABSTRACT

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Customer experience management is a prominent trend in managing customer relationships and communications. A large share of companies is not yet harnessing the full potential of marketing automation. Scientific research on both of the topics is relatively scarce, and the use of marketing automation in managing multi-channel customer experiences has not been scientifically researched before. The extant research on customer experience management, marketing automation and technology implementation is used to draw a framework for assessing the prerequisites for utilizing a newly adopted marketing automation platform in managing the full digital customer experience of the B2B business unit of a Finnish ICT provider. The data is collected with semi-structured interviews of seven representatives of different organizational functions of the case company.

The findings indicate that bringing the three topics into one framework is a useful approach as in the interview data, the topics were clearly interrelated. The case company fulfills many of the prerequisites, e.g., the cultural mindset of touchpoint journey management, but is advised to, e.g., clarify its processes and leadership of marketing automation. Marketing automation implementation should be guided by customer value and by experimentation on small populations.

TIIVISTELMÄ

Tekijä	Siiri Kähönen
Otsikko	Tapaustutkimus: Markkinoinnin automaation hyödyntäminen monikanavaisen digitaalisen asiakaskokemuksen hallinnassa
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Asiakaskokemuksen hallinta on merkittävä trendi asiakassuhteiden hallinnan ja asiakasviestinnän alueilla. Vain pieni osa yrityksistä onnistuu hyödyntämään markkinoinnin automaation koko potentiaalin. Molempien aiheiden tieteellinen tutkimus on ollut vähäistä, eikä monikanavaisen asiakaskokemuksen hallintaa markkinoinnin automaatiolla ei ole tutkittu tieteellisesti lainkaan. Tässä tutkimuksessa olemassa olevasta asiakaskokemuksen hallinnan, markkinoinnin automaation ja teknologian käyttöönoton teoriasta muodostetun viitekehyksen avulla arvioidaan niitä edellytyksiä, joiden tulee täyttyä, jotta suomalaisen ICT-alan yrityksen yritysasiakasyksikkö voi hallita monikanavaista, digitaalista asiakaskokemustaan markkinoinnin automaation alustalla. Aineisto kerättiin haastattelemalla puolistrukturoidusti seitsemää organisaation jäsentä.

Huomattiin, että kolmen mainitun aihealueen yhdistäminen yhteen viitekehykseen oli toimiva lähestymistapa, sillä aiheiden todettiin olevan sidoksissa toisiinsa. Monet viitekehyksen edellytyksistä täyttyvät yrityksessä. Toisaalta yritystä kehotetaan muun muassa selkeyttämään markkinoinnin automaation prosesseja ja johtamistapaa. Asiakkaalle luodun arvon sekä pienillä kohderyhmillä tehtyjen kokeilujen tulisi ohjata markkinoinnin automaation käyttöönottoa.

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Writing this thesis has been the single most demanding project I have ever encountered. It taught me a lot about my strengths and weaknesses, about determination and about hard work. There was no way over or around it: it was something I alone had to finish.

In the summer of 2019, I dedicated three months to writing but did not finish the thesis before getting back to work. The prolongation of the project caused me to almost drive myself to exhaustion during the last months of the year. Needless to say, and although I feel like I will never again write another word in English, writing these words and even feeling that there is some sense in the final version of the thesis feels fantastic!

I want to thank my thesis supervisor Anssi at LUT University and my contact person at the case company for providing all the guidance, support and ideas I needed for progressing. I'm thankful for having a great family – my mother, father and two sisters – who have taught me the values and drive for getting a university education. I am very thankful for my grandmother, Imppu, who has been there to tirelessly encourage me to keep on going. I want to thank my friends for helping me find joy in things outside the thesis and my work every day. Also, I want to thank Sinebrychoff brewery for an excellent selection of energy drinks, and Spotify, for unlimited access to brain food music.

In Helsinki, March 7, 2020

Siiri Kähönen

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LIST OF ABBREVIATIONS IN ALPHABETICAL ORDER

CEM - Customer experience management
CES – Customer effort score
CRM - Customer relationship management
DMP - Data management platform
MMH - Multi-channel marketing hub

1 INTRODUCTION

In the digital era, customers and companies interact with each other on an increasing number of channels. Tracking the relationship between a company and a customer and moreover, the effectiveness of marketing activities, is becoming more and more complex, and the adequacy of marketing to answer the modern challenges is under ongoing questioning. In the rapidly changing and rarely predictable environment, the marketing landscape is changing. In the business world, an emerging approach to creating competitive advantage is understanding the holistic journey of a customer with the firm: understanding the points where a customer interacts with the firm and the relation of the points to each other. The customer experience is formed in those touchpoints. At the same time, companies are implementing marketing automation tools to help with right-timed, personalized content distribution and with building holistic views of customer interaction.

In the first section, the structure of the thesis will be presented, and necessary information for understanding the need for this kind of a study is provided. The research methodology are shortly discussed, and the main topics of the study are introduced.

1.1 Background of the study

Marketing practitioners in consumer markets are more and more adopting customer experience management as an approach to surviving in the increasingly competitive environment. As consumers become more and more empowered and have an increasing pool of suppliers to choose from, customer experience management is seen as a promising approach for meeting the new market challenges (Homburg, Jozić, and Kuehnl 2015).

A study by Gartner (2014) found a significant increase in the number of firms that considered customer experience management an important source of competitive advantage. In 2010, 36% of the surveyed companies named customer experience management as their primary source of competitive advantage within the two coming years whereas, in 2014, already 86 % of the interviewees were expecting to compete with customer experiences by the year 2016. According to another empirical study by Jaruzeski, Loehr, and Holman (2011), in the future, customer experience management would become the most important attribute of the 1000 most innovative companies in the world.

While customer experience management awakes increasing interest among practitioners, there has been uncertainty among companies engaging in customer experience management about how it should be deployed and harnessed effectively (Temkin Group 2012), and still, in 2019, companies struggle to offer superior customer experiences (Temkin Group 2019). The uncertainty among marketers is in line with the scarcity of academic research on the topic. There are few studies on customer experience management, and the ones that can be found are fragmented across various contexts such as product, online, service, retail, and branding (Homburg et al. 2015).

At the same time, more and more companies are resorting to marketing automation tools in increasing the performance and effectiveness of marketing-related tasks. In this study, the relation of customer experiences and marketing automation platforms is discussed. There is little information to be found, either produced by the academic community or authors of managerial literature, about utilizing marketing automation tools in managing multi-channel customer experiences.

Another driver for conducting this study is the specific need of a Finnish company in the IT industry to harness the full potential of its marketing automation platform. The company has begun its journey toward efficient use of the marketing automation platform over the past two years, and hopes to speed up the implementation process and to gain competitive advantage.

1.2 The aim of the study and the research problem

The aim of the study is to understand the prerequisites for managing multi-channel marketing and digital customer experiences with the use of marketing automation technology. To do so, previously conducted scientific research around the topics of multi-channel customer experience management, marketing automation and technology implementation is examined.

More specifically, the research focuses on the post-implementation part of technology adoption. The case company has had the marketing automation tool for approximately two years, but the full implementation of the tool is still at a nascent state. There are elements of the tool that the company has started using, but some elements that are required to fully utilize the potential of marketing automation have not been deployed yet. As most of the research around the topic of technology adoption recognizes that there are several stages to adoption of technologies, the main focus of this research is in the part that happens after the technology acquisition has been made by the company: the phase after initial implementation, which, in this paper, will be called *post-implementation*.

The research is a qualitative, internal analysis of the present state of the case company. The data was collected with semi-structured interviews of seven representatives of the case company, a Finnish company in the connectivity, IT, and other digital services industry. In the paper, the internal development areas are recognized and discussed with the guidance of earlier published marketing automation and multi-channel customer experience related research results. The aim is to address whether the prerequisites for multi-channel marketing management are fulfilled and whether the case company can proceed to utilizing the chosen marketing automation platform in managing several communications channels and a large share of its digital customer experience with one marketing automation platform.

The paper also discusses the role of cross-functional cooperation in marketing automation implementation and multi-channel marketing management. Implementing a marketing automation tool is not believed to be a simple task and a system cannot be applied to an organization; instead, the implementation requires cross-functional collaboration and overall changes in the organization.

While the study aims at providing useful information for the case company to utilize in its process of marketing automation post-implementation, for the academic community, it is conducted to increase knowledge about a relatively little researched topic, multi-channel customer experience management with the use of marketing automation software. The importance of customer experience management has been increasingly recognized by marketing practitioners within the last few years, and thus, information collected, analyzed, and created as part of the study is useful to anyone interested in understanding, designing, and managing customer experiences.

Based on the goals of the study, the main research question is formed:

What are the prerequisites for using a marketing automation platform for multi-channel, digital customer experience management?

To answer the research question and to provide background for it, the question is divided into three sub-questions:

1. ***Why is successful multi-channel customer experience management important?***

2. ***What is the role of marketing automation in managing digital customer experiences?***

3. ***What are the prerequisites of successful multi-channel customer experience management and marketing-automation post-implementation?***

1.3 Preliminary literature review

The aim of the literature review is to introduce the reader of the thesis to what the academia knows about the main topics of the study. Thus, this chapter summarizes what has been discussed in academic research and literature about multi-channel customer experiences and marketing automation.

Customer experiences were first mentioned by Abbott (1955) and Alderson (1957) who were the first to present the idea that customers want more than just products or services. Definitions for customer experience have been drawn from a number of research fields, such as consumer behavior (e.g., Holbrook and Hirschman 1982) and customer relationship management (e.g., Meyer and Schwager 2007). The benefits of multi-channel customer experience management have been researched by a number of scholars, e.g., Ganesh (2004) in the retail context, and Lemon and Verhoef (2016). Payne and Frow (2004) and Ganesh (2004) presented the use of technology in multi-channel customer experience management.

Academic research on marketing automation is scarce. The first known mention of the topic was made by John D.C. Little as part of his presentation at the 5th Invitational Choice Symposium UC Berkeley 2001. The few researches have been conducted and definitions provided by Järvinen and Taiminen (2016), Heimbach, Kostyra, and Hinz (2015), Ginty, Vaccarello, and Leake (2012), and Cummings and Biltzer (2010). In B2B context, marketing automation has been researched by Wiersema (2013).

The use of marketing automation platforms as multi-channel marketing hubs has not been researched previously by the academic community. The term multi-channel marketing hub has been introduced by Gartner (2019) in their recent research. For multi-channel marketing hubs, there is no existing theory.

The research around marketing automation implementation is scarce. Models for implementation of technology have been presented by scholars such as Rogers

(2003), and research on the indicators of the performance of technologies has been presented by, e.g., Goodhue and Thompson (1995).

1.4 Theoretical framework

In this chapter, the visual presentation of a theoretical framework is presented. It summarizes the key concepts of the study and depicts the relations of the concepts to each other. The framework can be found in Figure1.

In this study, the key concepts are multi-channel customer experience management, marketing automation and implementation of technology. In the next sub-section, the concepts and other concept significant for understanding the thesis are briefly defined. The academic theories and other relevant information around the topics are presented in detail in the theoretical section of the work.

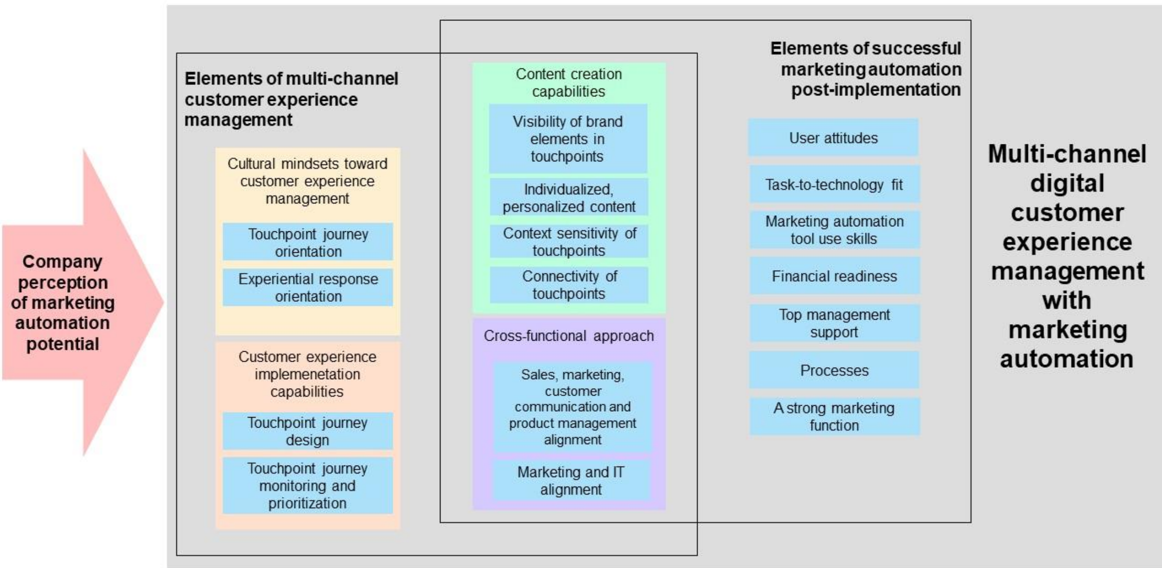

Figure 1. The framework of the study

1.5 Defining the key concepts

In this section, the main concepts of the thesis are gathered together and defined. The aim of this is to provide the reader a firm background for understanding the phenomena while proceeding with reading the paper.

Multi-channel customer experience. Adopted from the literature review by Lemon and Verhoef (2016), customer experience is a multidimensional composition of "*cognitive, emotional, behavioral, sensorial, and social responses"* a customer has toward the product and sales offerings as well as communications of a company throughout the whole customer lifetime. It consists of all the interaction in touch-points with the firm in the prepurchase, purchase, and postpurchase stages of the customer lifetime, both direct and indirect.

Managing multi-channel customer experiences means managing customer acquisition, retention and development activities in a manner that customer value is increased by designing, making use of, coordinating, and tracking channels through which companies and buyers interact. (Neslin, Grewal, Leghorn, Shankar, Teerling, Thomas, and Verhoef 2006)

Marketing automation is the "*automatic customization or personalization of marketing mix activities*" (Heimbach et al. 2015), which aims at satisfying the needs of current and potential customers by *"automatically personalizing relevant and useful content"* (Järvinen and Taiminen 2016). In practice, a marketing automation software or platform is used to conduct marketing automation.

Multi-channel marketing hubs are marketing automation platforms that claim to have all the necessary elements for orchestrating all or most of the company's communications in its digital channels. Often, multi-channel marketing hubs are connected to offer and lead management. (Gartner 2019)

Post-implementation stage of technology. The adoption of technology in an organization consists of steps. Depending on the definition, the names of the steps vary, but the step following the initial implementation step can be called post-implementation stage. According to Rogers (2003), the post-implementation stage can contain, e.g., decisions whether or not the organization will continue the use of an implemented tool.

1.6 Delimitations of the study

There are certain delimitations for the study. The research on customer experience by conducting interviews with the employees of the case company was limited to questions about the multi-channel, digital customer experience. Offline touchpoints such as events and stores were not asked about, but were sometimes mentioned by the interviewees.

The research is about implementation of technology. However, only the stage that follows the initial implementation, in this paper called post-implementation stage, is researched, as that is the stage where the case company was at the beginning of the research.

As any single case study, this research is limited to the context of a single case organization. Even though the research is guided by previously published, more general academic information, the findings of this study aren’t necessarily generalizable to other organizations. However, the study aims at providing information that could be used by other organizations than the case company.

1.7 Research methodology

In the study, a qualitative research method was used. There is little academic literature about marketing automation and none about multi-channel marketing and multi-channel digital customer experience management. A qualitative method can be used for building and testing theory (Creswell 2014). More specifically, the research is a case study which aims at composing an image of the current state of a Finnish IT operator and whether it has the readiness to widen its use of marketing automation to utilize it in multi-channel digital customer experience management.

The research was conducted by interviewing seven members of the case organization. The interviewees were chosen based on their positions in the organization and roles in marketing automation development and implementation. The interviews were conducted in October and November of 2019 and the conversations were steered by semi-structured interview questions, which can be found at the end of the paper (Appendix 1).

1.8 Structure of the study

The paper can be divided into two sections: the theoretical section and the empirical section. Before the theoretical section, the topic and main concepts are introduced, a preliminary literature review for defining the research gaps is presented, and the research questions as well as the theoretical framework for the study are shown.

The theoretical section consists of chapters two, three, and four, in which existing literature and theories on customer experience management and multi-channel customer experiences, and marketing automation and its implementation are presented. Chapter four serves as a synthesis chapter which, once more, justifies researching both customer experience management and marketing automation in the same study and addresses the composition of the framework for the study from the information presented in chapters two and three.

The empirical section consists of chapters five and six. Chapter five introduces the research design and methods, and the means of data collection and details about the conducted interviews are addressed. In chapter six, the interview data is analyzed based on the framework formed in the theoretical section of the paper. Chapter seven draws the results of the research together. The state of the case company and its marketing automation post-implementation is assessed based on the interview results presented in chapter six. Managerial implications for marketing practitioners are offered, and limitations and proposals for further research are addressed.

2 CUSTOMER EXPERIENCE MANAGEMENT

In a study conducted by Accenture and Forrester in 2015, improving customer experience was an important priority among officers, vice presidents, and managers responsible for customer experience creation and management, in several large, international companies such as Google, Amazon, and KPMG. (Accenture, 2015) The need for managing customer experience has been recognized by the professional community, but academic marketing literature has been slow to adapt to the development. Writings about customer experience have been published in managerial journals or books for marketing and other business practitioners (e.g., Berry, Carbone, and Haeckel 2002; Meyer and Schwager 2007), and instead of focusing on the scientific theories, the authors have offered insight into how companies should be organized for and what the outcomes are of effective customer experience management.

2.1 Customer experience

In the following chapters, academic theories and frameworks around the concept of multi-channel customer experience management and customer journeys will be reviewed. The most relevant managerial publications will also be presented.

2.1.1 Defining customer experience

The essence of customer experience has been discussed by several scholars. The definitions can be divided into two categories: customer experience as a means of engaging customers or as a marketing approach, and customer experience as an evolvement of all the experiences the customer has with the firm.

The first research stream initiated already in 1955, when Abbott, and in 1957, when Alderson, studied relationships between consumers and companies and applied the idea that, in fact, consumers do not only want to buy products but instead, experiences that satisfy them. In 1982, Holbrook and Hirschman studied consumer behavior and theorized that consumption is affected by experiential aspects. Other research (e.g., Thompson, Locander, and Pollio 1989) continued discussing the same idea and expanded it with broader human behavior principles, applying the emotional aspects of customer experiences and decision making.

In 1999, Schmitt was among the first to recognize the concept of customer experience and its importance, and Pine and Gilmore (1998) reflected the importance of customer experience in the day's society, stating that durable and strong customer experiences can offer significant opportunities for companies.

In marketing literature, the attention in customer management has mainly focused on customer value creation and how companies can benefit financially. Specific interest has been shown in developing metrics for customer value and customer lifetime value (CLV) measurement (Gupta, Lehmann and Stuart 2004; Kumar and Shah 2009) instead of value creation for customers (Kumar and Reinartz 2006; Bügel 2010).

According to the scholars in the first, roughly defined category, customer experience is seen as a means of evoking memorable emotions that strengthen the bond between the customer and a firm or a brand. Sometimes, customer experience is seen as distinct from product and services but as something that can be bought separately to *"spend time enjoying a series of memorable events that a company stages - - to engage him in an inherently personal way"* (Pine and Gilmore 1998, p. 3).

The researchers in the second category have taken a broader approach. For instance, Schmitt, Brakus, and Zarantonello (2015) suggest that customer experience is a holistic phenomenon. It consists of the customer's interactions with a firm on cognitive, sensory, emotional, social, and spiritual levels and is created at every exchange of service. This broader definition has been supported by several scholars (e.g., Gentile, Spiller, and Noci 2007; Verhoef, Lemon, Parasuraman, Roggeveen, Tsiros, and Schlesinger 2009; Lemke, Clark, and Wilson 2011; Bolton, Gustafsson, McColl-Kennedy, Sirianni, and Tse 2014) Albeit the categorization of types of interaction between customers and companies may differ depending on the conceptualization, the fundamental idea remains the same, adapted from Brakus, Schmitt, and

Zarantonello 2009, and Verhoef et al. 2009: the holistic customer experience is a combination of an individual's responses to a company or a brand and is formed as the individual lives through a journey of touchpoints during his or her customer lifetime and is affected by the individual's related environment. As Lemon and Verhoef (2016) summarize in their extensive literature review on the topic, *"the current literature states that customer experience is a multidimensional construct focusing on a customer's cognitive, emotional, behavioral, sensorial, and social responses to a firm's offerings during the customer's entire purchase journey"*.

The discussion in managerial literature has adopted the holistic approach. Meyer and Schwager (2007) state that customer experience is the *"internal and subjective response"* individuals have toward interaction, direct or indirect, with the firm, and it concerns all parts of a firm's product offering: not only customer service decisions but also marketing-related aspects such as advertisement, product reliability and dimensions of the four P's. However, many firms don't understand the importance of customer experience, and even though some collect data regarding it, attempts to analyze and/or act on the findings often fail. People within the organization likely have very varying understandings regarding customer experience, and the decisions made about its components are rarely monitored or questioned. (Meyer and Schwager 2007)

Digital customer experience

This paper adopts the previously described approach to customer experience: it is seen as a customer centric framework for viewing the overall experience the customers have with the firm, consisting of all the interaction the customer takes part in with the firm, either directly or indirectly. Thus, customer experience describes the overall perception the customer has of the company.

In the paper, digital customer experience will be assessed. The view of digital customer experience in this paper is the following: digital customer experience is in all ways similar to general customer experience, but only digital channels, such as websites, social media channels, email marketing, SMS messages, are considered.

Customer experience management

Another, sometimes separately viewed aspect of customer experience is customer experience management. In their research, Homburg et al. (2015) view customer experience management as a tool for creating and maintaining long-term customer loyalty, providing an industry-spanning, theoretically and empirically firm conceptualization for the phenomenon. Homburg et al. (2015) present strategic guidelines for designing and directions for continuous improvement of customer experiences. In relation to other scientific research about the topic, they conclude that customer experience management, indeed, implements an evolving marketing concept, and should be seen as part of marketing management theory.

The research of Homburg et al. (2015) defines customer experience management as a company-wide managerial approach that consists of three categories: the firm's cultural mindsets toward customer experiences, strategic directions for designing customer experiences, and capabilities to continuously renew the company's customer experiences. Thus, according to Homburg et al. (2015), customer experience management is a matter of organizational culture, whereas earlier discussion has focused on the methods and processes of/for customer experience management. A customer-experience-centric culture leads to customer-centricity.

The customer experiences can be viewed from the point of view of three elements of cultural mindsets. *Touchpoint journey orientation* refers to considering decisions regarding touchpoints across prepurchase, purchase, and postpurchase phases the most important market-facing decisions to be made across the company. Understanding where the customer is coming from and where he or she is going is crucial for offering a positive customer experience. *Experiential response orientation* refers to understanding that customer experiences can be sensorially or affectively stimulating and their direct impact may be hard to measure, but each touchpoint is equally important in customer loyalty enhancement. *Alliance orientation* refers to seeing the importance of aligning the customer experiences in all the touchpoints, whether the touchpoint is in hands of the company itself or in hands of another company, to achieve customer loyalty. (Homburg et al. 2015)

In the second aspect, strategic directions for designing customer experiences, touchpoint journeys are considered strategic decision-making objects. Strategic directions are firm-wide guidelines on facing the market and, more than cultural mindsets, they have direct effects on how the company implements marketing tasks and faces its customers. Strategic directions include *thematic cohesion of touchpoints*: the firm's touchpoints should be extended along a coherent brand theme that should promise *"to provide customers a certain lifestyle or activity with the help of an interrelated set of multiple touchpoints*". Another strategic direction, *consistency of touchpoints,* advices organizations to implement their elements of corporate identity across various touchpoints to ensure loyalty-enhancing responses as time goes by. *Context sensitivity of touchpoints* is about the relevance to be considerate of an individual customer's needs and hopes for specific touchpoints. For instance, a customer who is willing to repurchase a product likely wants to receive different information on a website than a customer who is visiting the first time. Understanding the context sensitivity can help optimize the touchpoints by making them more informative, easier to use, personalized, and flexible. The fourth strategic direction is *connectivity of touchpoints,* enabling functional transitions between touchpoints in online and offline environments and, for instance, seamless switching between devices. (Homburg et al. 2015)

The third category of customer experience management, firm capabilities of customer experience management (CEM), are *"the process-oriented manifestation of the other two CEM categories".* It means the implementation of the existing mindsets and introducing strategies, processes, and methods that carry out those mindsets. The customer experience management capabilities interact with each other, enabling constant renewal of customer experiences and long-term customer loyalty - a competitive advantage. There are three elements. *Touchpoint journey design* means using potential touchpoint journey design as a basis for business planning and modeling. *Touchpoint prioritization* is the capability of directing the ongoing adjustment of touchpoints and thus, allocating resources. With *touchpoint journey* *monitoring,* firms observe and analyze the performance of their touchpoints, for instance, by monitoring the number of online visitors. *Touchpoint adaptation* is about using the collected monitoring data and using it for developing and modifying the existing or new touchpoints proactively. (Homburg et al. 2015)

As part of their customer experience management research, Homburg et al. (2015) found that the majority of companies engaging in customer experience management have proceeded to using net promoter score (NPS) as their measurement instead of traditional customer satisfaction measures. NPS represents customer loyalty based on the overall quality of the multiple customer experiences (Keiningham, Cooil, Andreassen, and Aksoy 2007).

According to Lemon and Verhoef (2016), the management, design and delivery of customer experiences can be viewed from multiple points of view. In managerial literature, Berry et al. (2002) view it from the company's point of view stating that essentially designing and shaping the experience a customer receives is in the hands of the company itself. It can also be viewed from the perspective of the customer (Schmitt 2011), or from a cocreation perspective, which focuses on the role of the customer in building an experience by interacting with other actors in a wide ecosystem (Chandler and Lusch 2015, De Keyser, Lemon, Keiningham and Klaus 2015; Prahalad and Ramaswamy 2003).

In their managerial paper, Meyer and Schwager (2007) suggest that managing customer experience requires understanding the raw reality of the customers' past experiences and expectations. Developing customer experience is not in the hands of a single function but happens in all parts of the organization with the orchestration of senior management. However, as statistical data analysis and its techniques have significantly developed during the past ten years, customer experience management and CRM data can be combined and complement each other, offering a more profound image of the experience of the customer. Thus, issues needing a solution can be tracked and responded to. (Meyer and Schwager 2007)

Defining customer experience and customer journeys through other concepts

In the 2016 literature review, Lemon and Verhoef rise a relevant question about the relationship of the topics to other marketing concepts. Customer experience is a relatively recently recognized term and distinguishing it from other marketing and business-related concepts has proven to be difficult among academic researchers. To understand customer experience, some understanding about the near concepts is required. Customer experience seems like a construct that brings together a variety of researched marketing topics, at the same time excluding other close, established concepts such as relationship marketing and customer equity (Lemon and Verhoef 2016). Based on an extensive literature review on the history of customer experience theory and its related topics, Lemon and Verhoef (2016) suggest that customer experience theory has similarities with service quality assessment, SERVQUAL model by Parasuraman, Zeithaml, and Berry (1988), and service blueprinting by Bitner, Ostrom, and Morgan (2008).

Lemon and Verhoef (2016) state that, simultaneously with the CRM development, the movement has been toward customer centricity and customer focus as valuable strategic approaches. Earlier, the development toward customer-centric views of individuals has been hindered by the lack of customer-specific data. Now, the data is available, and there is enormous potential in its utilization.

A part of customer centricity is understanding the so-called ‘personas’ (e.g., Herskovitz and Crystal 2010), and focusing on identifying the typical experiences and needs of the specific segment that the persona represents. Christensen, Cook, and Hall (2005) have taken customer-centricity even further and stated that companies should strive to understand the ‘jobs-to-be-done’, that is, understanding the circumstances in a consumer’s life that potentially lead to purchasing – truly seeing customer experiences from an individual’s perspective. The shift toward maximizing long-term profit by aligning the firm’s offering with the needs of its most valuable customers has enabled companies to be better prepared for customer experience design and management. (Lemon and Verhoef 2016)

Currently, the major line of research in customer management has focused on understanding customer engagement. Especially the development of social media has brought forth the importance of customer engagement behavior. In general, customer engagement means distinguishing not only purchasing but the attitudes and behaviors beyond it. It can be defined as *“the customer’s behavioral manifestation toward a brand or firm, beyond purchase, resulting from motivational drivers”* (Van Doorn, Lemon, Mittal, Nass, Pick, Pirner et al. 2010, p. 253). (Lemon and Verhoef 2016)

According to Homburg et al. (2015), as is the case with defining customer experiences in academic literature, customer experience management, too, is defined in relation with and interrelated to other marketing concepts. Especially its position toward CRM has raised discussion. Meyer and Schwager (2007) contributed to the discussion by differentiating CRM – utilizing customer knowledge – and CEM – utilizing information about customers’ real-time reactions and behavior. However, Payne and Frow (2005) see any kind of customer information utilization as a part of strategic CRM. There has also been discussion over the potential of customer experience management to even eventually replace CRM (Homburg et al. 2015).

Meyer and Schwager (2007) compare customer experience management to customer relationship management. The main difference between the two theoretical trends is in what is being researched. In customer relationship management, data is collected about the customer, whereas customer experience management is about building an image of what the customer knows and how he or she feels about the company. Whereas customer experience management looks into the customer interaction touchpoints by monitoring them by conducting surveys and, e.g., voice-of-customer research, customer relationship management monitors customer data by utilizing market research material, point-of-sales data and, e.g., automated sales tracking and analyzing records of customer interaction only after they have happened. In customer experience management, future performance can be improved by recognizing gaps between customers’ expectations and experiences and inserting relevant products to help with diminishing the gap, whereas customer relationship management aims at increasing sales by bundling demanded products with the ones the company wants to sell but necessarily aren't in demand at the moment. (Meyer and Schwager 2007)

2.1.2 Customer journeys and touchpoints

Understanding the touchpoint journey of a customer has been recognized as a more universal and useful approach to understanding customer experience and can be more helpful in understanding the customer relationship over time from the individual's point of view (e.g., Zomerdijk and Voss 2010) than defining and categorizing customer experience from the point of view of the company (e.g., Lemke et al. 2011). With touchpoint (often: 'touch point') journey orientation, it is possible to manage all touchpoints in the marketplace as a whole, and the most important moments for successful customer experiences can be addressed more easily (Ghoshal et al. 2014).

Researchers refer to touchpoints when discussing the points where a customer interacts with the firm. For instance, Lemon and Verhoef (2016) describe the customer experience process by dividing it into three stages. The first stage, *prepurchase*, includes the first stages of decision making: need recognition, consideration and search activities. The *purchase stage* covers customer behaviors such as choice of product or service, placing an order, and payment. The final stage is *postpurchase*, which portraits behaviors after purchase and could theoretically extend to the end of the buyer's life. The behaviors in the third stage often include customer service activities, and usage or consumption of the product or service. (Lemon and Verhoef 2016)

In each stage, the customer interacts with the organization at touchpoints. Incidents during the postpurchase stage may lead into customer loyalty in the form of repurchase or other type of engagement to the company or start the experience journey over from the prepurchase stage. Thus, recent research (Court, Elzinga, Mulder, and Vetvik 2009) over customer loyalty has extended the model of customer experience process to include the so-called "loyalty loop". (Lemon and Verhoef 2016)

Based on existing research material (e.g. Baxendale, Macdonald, and Wilson 2015; De Haan, Wiesel, and Pauwels 2016), Lemon and Verhoef (2016) identify four customer experience touchpoint types. The touchpoints can be characterized by the extent to which the company has control over them, and the relevance and strength of each category may vary depending on the product offering of the company or the journey the customer goes through. There are attribution models to help with identifying the critical touchpoints that should be viewed profoundly by the company. *Brand-owned touchpoints* are under the company's control and managed and designed intentionally. They include the marketing materials and brand- and product-related marketing mix decisions made by the firm, e.g., media decisions (advertisements, look-and-feel of websites, and experiences with the company's loyalty programs, as well as price, salespeople, and packaging. *Partner-owned touchpoints* are managed by the organization and one or several of its partners, for instance, distribution partners or marketing agencies. The line between brand-owned and partner-owned touchpoints is easily blurred. The firm, its partners or others cannot influence the third type of touchpoints, *customer-owned touchpoints.* For example, in the prepurchase stage, the customer may have his or her own desires or needs for the product, which cannot be influenced. Through the journey, customers are influenced by *social/external touchpoints.* The recognition of these touchpoints emphasizes the meaning of peer influence, such as product reviews of acquaintances or strangers, in all stages of the experience. (Lemon and Verhoef 2016)

Also Payne and Frow (2004) describe the customer experience through touchpoints. Different types of customer touchpoints are also recognized and used as a basis of a managerial model for understanding and developing customer experience by Meyer and Schwager (2007), who categorize touchpoints as direct or indirect, emphasizing the fact that encounters that affect customer experience can be seemingly minor but have a great impact. Duncan and Moriarty (2006) divide touchpoints into verbal (e.g., encounters with the firm's advertising) and nonverbal (e.g., using the product) touchpoints.

In the empirical section of this study, only the touchpoints the company has control over will be discussed. Thus, the touchpoints that Lemon and Verhoef (2016) would categorize as partner-owned, customer-owned, or social/external touchpoints, or what Meyer and Schwager (2007) would categorize as indirect touchpoints, are left outside the scope. This is done, as it is believed that in touchpoint and customer experience management, the focus should, indeed, be in the elements and channels that the company can manage.

2.2 Multi-channel customer experience management

Often, the customer experience consists of the customer's interactions with the firm in many channels. Multi-channel customer experience management means managing the different channels and interaction touchpoints. According to a study by Shop.org and Boston Consulting Group (2001), in which 63 retailers from different categories and with various sizes were interviewed, the value of a customer to a company correlates positively with the number of channels on which the customer interacts with the company. The most valuable customer is the one that finds information and purchases products or services on several channels. Cross-channel coordination is the most effective way for retailers to increase their share of customers' wallets and, among other benefits, not only increases customer lifetime value but also has a direct influence on customer loyalty and retention. (Shop.org and Boston Consulting Group 2001)

According to Lemon and Verhoef (2016), the positive impact of aligning experiences on multiple channels is recognized by a number of scholars. According to Ganesh (2004, p. 142), multi-channel integration is "*providing an integrated system capable of handling multiple channels of operation for an enterprise*". Payne and Frow (2004) point that an unaligned experience across channels can confuse the customer and diminish his or her view of the firm and thus, risk business relationships.

2.2.1 The use of technology in multi-channel customer experience management

The use of correct technologies can have a significant impact on the development of a more informed multichannel strategy and as a result, an outstanding customer experience. Payne and Frow (2004) name several use cases where technology can be of use in customer experience development. For instance, the development of database technologies can prove very useful: segmentation, targeting, and differentiation of products, customers and communications could be more effective. Search, analysis, and tracking tools and features for following and understanding the effectiveness of marketing activities could improve, which, in turn, can follow to an increase in marketing ROI. The right tool may also improve the company's abilities to record and analyze responses to different messages sent through its communication channels. As a result, the company can develop models for predicting the responses of certain customer segments to different types of messages. With the use of technology in customer experience development, educated projections of customer behavior can be formed and used by marketers to evaluate potential communication patterns that should be used to achieve the best possible results. (Payne and Frow 2004)

In 2004, Ganesh studied the role of IT in multichannel integration in retail context. According to the research, web services can play a crucial role in efficient CRM implementation and thus, in multi-channel integration. As the internet already had emerged as a strong sales channel, retailers would likely have to increase their IT budgets to maintain a single view of the customer to survive in increasing competition and to maintain margins.

According to Ganesh (2004), a part of multichannel integration is about providing a system that is capable of handling multiple operation channels. The personnel involved in IT investment decisions must be considerate of managing customer interactions across all channels, because customers interact with companies with many different devices. At least in retail context, the company representatives must offer a coherent buying experience across the channels and devices. (Ganesh 2004)

2.2.2 Cross-functional approach to multi-channel customer experiences

Rawson, Duncan and Jones (2013) have discussed customer journeys and in their managerial article in Harvard Business Review (2013), they state that there are great benefits to be gained from successfully managing entire customer experiences: customer journey management can be used as a collaborative cross-function tool that the whole organization can benefit from that enables enhancement of customer and employee satisfaction, churn reduction, and increase in revenues. Albeit organizations may be successful in creating customer satisfaction with singular transactions, few companies are successful in managing the cumulative experiences in all communication channels. Managing the total customer satisfaction requires managing service operations. (Rawson et al. 2013)

The financial benefits of perfecting customer journeys are visible. Case examples in the insurance and pay TV industries have shown that superior performance in customer journeys leads to faster-growing revenues. Across industries, focusing on customer journeys correlates with lower churn, high revenues, and re-purchasing. (Rawson et al. 2013)

Customer journey management is difficult because service delivery happens in organizational siloes and because services are designed and delivered by several functional groups that all have a say in how the company is represented toward its customers. As there are many actors, the sight of what customers really want and need is easily lost. As a solution, Rawson et al. (2013) suggest taking a cross-functional approach, shifting from touchpoint orientation to journey orientation by engaging all functions of the organization in redesigning the entire customer experience by identifying the key journeys to begin the transformation with. (Rawson et al. 2013)

The potential benefits of shifting from touchpoint orientation to managing customer journeys has been recognized by the organization of the case company of this thesis. The organizational competencies for adopting a cross-functional approach to enable an efficient post-implementation of the marketing automation tool will be discussed in the empirical part of the study.

Companies likely choose to communicate with their customers in several channels. Incoherencies or conflicts in the messages distributed by the company in its different channels may lead into customer confusion or misinterpretation of the company's messages. If that happens, the customer's image of the organization may be negatively affected, which can lead to negative word of mouth. (Payne and Frow 2004) To actively form a specific image, a company must ensure that its messages are consistent (Storbacka 2001a, 2001b).

The recent interest of companies in customer experience management can be explained with the shift toward multi-channel interaction in which communication between companies and customers happens through several touchpoints and as a result, customer journeys are complex and harder to comprehend, and omni-channel communication management has become the new norm (Brynjolfsson, Hu, and Rahman 2013; Verhoef, Kannan, and Inman 2015). At the same time, social media creates a platform for customer-to-customer interaction (Leeflang, Spring, Van Doorn, and Wansbeek 2013; Libai, Bolton, Bugel, de Ruyter, Gotz, Risselada et al. 2010). As a result, companies have significantly less control over the journey of the customer and customer experiences in general (e.g., Brynjolfsson et al. 2013). Edelman and Singer (2015) and Rawson et al. (2013) state that in the new, more complex interaction environment, delivering positive customer experiences requires integration between multiple business functions, e.g. integrating marketing with IT, logistics, and external partners.

The Marketing Science Institute (2014, 2016) named customer experience as a significant research challenge of the near future, potentially because of the increasing complexity of customer interaction and because it is believed that positive customer experience as part of customer journeys can have a positive financial impact. For instance, conversion rates at multiple touchpoints as well as customer loyalty can be higher, and customers may be more eager to spread word-of-mouth (Court et al. 2009; Edelman 2010; Homburg et al. 2015).

2.2.3 Individualized customer experience and personalization: Benefits and requirements

In the competition of today, superior customer experience is about building long-term profitable relationships and offering world-class service (Payne and Frow 2004). The key to success may be an individualized relationship through every economically feasible situation where the customer interacts with the company on any channel (Peppers D., Rogers, M., and Dorf, B. 1999). However, this individualized relationship must be offered at every interaction and over time to generate trust between the customer and the company, which potentially leads to a stronger relationship and to higher levels of opportunity and profit (Payne and Frow 2004). A consistent set of high-quality experiences throughout the customer's lifetime creates an 'emotional reservoir of goodwill' toward the supplier firm, which increases the likelihood of continuing as a customer (Payne 2003).

2.2.4 Managing multichannel integration: Requirements

Managing a multi-channel customer experience and creating a multi-channel, integrated strategy requires determination of which channels to offer to which customer for what purposes. To efficiently manage multi-channel experiences, companies must overcome some challenges: they have to understand the behavior of their customers, be able to evaluate their existing and potential channels, make decisions about allocating resources across different channels, and to coordinate their channel strategies. (Neslin et al. 2006)

Payne and Frow (2004) advise companies to plan and execute a channel strategy that ensures that a great customer experience is generated within channels and across them. To create a successful customer experience, firms should consider the typical and a perfect customer experience within and across channels and how the customer experience can be sustained and improved. To improve the level of customer experience within a channel, companies should understand the components of an outstanding customer experience and the components of their typical customer experience amongst firms in the same industry and amongst their key customer segments. (Payne and Frow 2004) However, the profit potential of each customer segment should be calculated before investing in better customer experience quality, which means utilizing a segmented service strategy (Payne and Frow 1999).

Madaleno, Wilson, and Palmer (2007) researched multi-channel customer experience in the B2B context. In the study, 579 SME customers of a high-technology service provider company were surveyed, taking into consideration both the experience on the web channel and experiences with the firm's salespeople. Madaleno et al. (2007) concluded that the multi-channel consistency has a remarkable impact on customer satisfaction, and that the choice of channels and satisfaction with those single channels have an impact on the level of general satisfaction both in cases where customers interact directly with the salesforce of the firm and in cases of indirect interaction. When customers are indirect, consistency between the supplier's website and the experience with the intermediary's salespeople is important. Thus, both customer experience on single channels and multi-channel integration should be understood and optimized by companies that want to improve their customer experiences. (Madaleno et al. 2007)

3 MARKETING AUTOMATION

As information technology develops, marketing professionals have more and more possibilities to increase the efficiency of marketing activities through automation (Heimbach et al. 2015; Järvinen and Taiminen 2016). Marketing automation enables practitioners to provide consumers superior customer experiences, deliver relevant and timely content and track the moves of their customers, simultaneously providing quality insights that support other business units (e.g., Ginty et al. 2012).

According to the wide research in the B2B field (Wiersema 2013), it is possible that B2B companies don't utilize marketing automation tools to the full extent. The main development in the B2B sector lies in utilizing marketing automation tools in the technological automation of tasks that otherwise would be performed by marketers manually (Wiersema 2013). Thus, reliable and scientific information on the potential benefits of marketing automation is needed.

3.1 Defining marketing automation

According to Heimbach et al. (2015), the first known mention of the term *marketing automation* was made by Little in 2001. Then, Little referred to marketing decision support automation online and stated that the key essence of marketing automation was to help retailers make decisions and act based on available information about the customer at hand. This information could be gathered by analyzing the digital footprints of the customer, creating appropriate models and using them as a base of relevant managerial implications for the complete purchase funnel. The essence of the contribution of marketing automation to daily business life was the following: *"What do we tell retailer X to do when customer Y arrives on Monday morning?"* In the past, marketing automation has also been referred to as, e.g., lead management automation, and demand creation and generation tools, but 'marketing automation' is the most prominent term for describing the concept, used both by vendors and companies adopting it (Cummings and Blitzer 2010).

In the 21st century, there are different views to marketing automation. Some authors such as Del Rowe (2016) and Ginty et al. (2012) see marketing automation as a tool for strategic planning and as a research for strategic customer relationship management. Marketing automation is a useful tool in building long-term customer relationships, not only a marketing email management tool (Del Rowe 2016). On the other hand, Buttle and Maklan (2015) consider marketing automation a tool for conducting operational marketing. Heimbach et al. (2015) define marketing automation as *"automatic customization or personalization of marketing mix activities"*, and Järvinen and Tuominen (2016) state that marketing automation means aiming at satisfying the needs of current and potential customers by *"automatically personalizing relevant and useful content"* and suggest that marketing automation is a combination of technologies and processes. Ginty et al. (2012) define it from a lead management perspective and view it as a combination of methodological and technological aspects that can be used to enhance the collaboration of marketing and sales units by understanding and engaging consumers and triggering exact communication based on behavior, thus generating leads for the sales team.

Some marketing automation tools have also been referred to as multi-channel marketing hubs (MMH). According to a research conducted by Gartner (2019), a multichannel marketing hub is "*a technology that orchestrates a company's communications with and offers to customer segments across multiple channels. These include websites, mobile, social, direct mail, call centers, paid media and email. MMH capabilities also may extend to integrating marketing offers/leads with sales for execution in both B2B and B2C environment*s". The marketing automation tool implemented by the case company is one of the MMH platforms.

3.2 Development of marketing automation software

Heimbach et al. (2015) have researched the development of marketing automation. In 2001, companies were facing immerse amounts of data that was automatically collected online, and the challenge was that there were no appropriate models for reacting to customers' choices on the websites. Initially, marketing automation understanding was harnessed to creating recommendation engines and real time personalized pricing systems, although automated decision support was originally designed to assist on all aspects of the traditional marketing mix activities. However, the use of price discrimination was hindered by public backlash and potential negative publicity. (Heimbach et al. 2015)

Now, customer purchasing decisions are increasingly being influenced by digital communication channels (Lingqvist, Plotkin, and Stanley 2015; Wiersema, 2013). The development of modern information technology has been behind the rise of marketing automation as part of digital marketing (Järvinen and Taiminen 2016). Companies are provided a set of automated tools for delivering a large mass of customers timely and relevant content and personalizing the customer experience (Heimbach et. al. 2015; Montgomery and Smith 2009). The emerged technologies are called marketing automation platforms or software and they can be used to deliver the right content to the right individual at the right time – that is how marketing automation happens (Järvinen and Taiminen 2016). Examples of such software are, e.g., ActiveCampaign, Hubspot, Ontraport, Prospect.io, and Pardot (Ventureharbour 2019).

The mechanisms of marketing automation on the marketing automation platforms have been depicted in a general framework of marketing automation by Heimbach et al. (2015) Marketing automation begins with current and stored information about the user or customer: there is data about the online behavior of the customer, or data about the history of an individual as a customer of the firm. For instance, the company may have access to data about his or her reactions to newsletters sent to the customer. A specific piece of data or information triggers a set of rules set by a representative of the user company of the marketing automation on a monitoring interface that is used to inspect and to control the use of the automation tool. According to the set of rules, the tool automatically applies a customized object – a certain content, structure, offer, e.g., in or on a specific medium: a website, an email, a mobile app, or offline.

Depending on the properties of the software, there are numerous use cases for marketing automation tools. They can be, e.g., used for analyzing campaigns and customers, managing campaigns, gaining a single view of the customer, planning marketing activities, targeting activities to specific customer segments, maximizing operational effectiveness, and learning from previous marketing automation experiences (SAS 2011). Many marketing automation tools have customer relationship or sales, email sending, content, eCommerce, and social media capabilities (Ventureharbour 2019).

According to a multi-channel marketing hub research by Gartner (2019), the MMH platforms have taken a step further in automating the customer communication processes and created capabilities for utilizing artificial intelligence and machine learning and creating content and communications recommendations for relevant, often automated, real-time interactions.

As stated earlier, customer experience management is globally recognized as one of the most important developments in the world of marketing practitioners. However, in 2014, marketing automation technologies were yet not widely adopted (Venturebeat 2014). There is a need for scientific research on the advantages of conducted marketing automation in real life.

3.3 Marketing automation implementation

According to the diffusion of innovations theory of Rogers (2003), the adoption of technology consists of five steps. During the first step, *knowledge*, an individual familiarizes himself or herself with information about an innovation after recognizing its existence. During the second step, *persuasion*, the person makes an assessment of the innovation, forming a favorable, neutral or negative attitude toward it. Based on the assessment in the *persuasion* stage, a decision is made. If the individual decides to reject the innovation, the adoption stops there. If the decision is to adopt the innovation, the *implementation* begins and the individual starts using the innovation. In this model, the final stage is called *confirmation*, and if the individual forms a negative perception of the innovation after beginning the usage of the innovation, he or she may reverse the implementation decision. (Rogers 2003)

3.3.1 The post-implementation stage of marketing automation

In the case company, the marketing automation tool has already been put to use in the form of simple automated email sending workflows and the company aims at utilizing the tool more holistically in multi-channel customer experience management. The company has already gone through the stages of recognizing the existence of an innovation and information gathering, made an assessment of the innovation and formed a positive attitude and made the decision to adopt the platform. The use of the platform has begun, but the company is at a stage of seeking additional results from its use. Therefore, the focus of this study is in the stage that follows the implementation of the tool, but unlike in Rogers' (2003) model, the stage is not called confirmation. It is assumed that the case organization is not yet ready or willing to form a perception of the innovation, since there is an understanding that the platform has not been utilized to its fullest yet. Thus, another stage between the steps of implementation and confirmation is defined, and in this paper, it will be called *post-implementation*.

The challenges in post-implementation of marketing automation

The other point of view in the framework of this study is the aspect of challenges in the post-implementation of the marketing automation platform. Since there is no extant scientific research on this exact topic, the elements are adopted from general research around the topic of IT technology adoption.

Some of the elements of this half of the framework are not specifically drawn from research around the post-implementation stage but from the implementation process in general. This is because the case company is at a stage where the marketing automation platform has been purchased, but the need for additional elements to fulfill the marketing automation technology stack is recognized. While the company is at a post-purchase stage, it is simultaneously at a pre-purchase stage while learning to utilize the marketing automation platform at its fullest. The following aspects are recognized as challenges to overcome to be able to move from this stage toward efficient use of marketing automation.

Task-to-technology fit and user attitudes

The TPC model was developed by Goodhue and Thompson in 1995 to help companies and employees utilize IT systems better. The model aims at understanding system utilization from two points of view: user attitudes as an indicator of the level of utilization and task-technology fit as an indicator of the performance of the technology. The fit of a technology to a task means that the technology supports what meant to be done with the technology. (Goodhue and Thompson 1995). The model is well validated, tested and supported by, e.g., Staples and Seddon (2004).

Organizational readiness

In 1995, Iacovou, Benbasat, and Dexter researched adoption of Electronic Data Interchange (EDI) among small firms and tested the interrelation of organizational readiness and EDI adoption. The concept of organizational readiness was also suggested by Alsaad, Mohamad and Ismail (2017). According to the framework by Iacovou et al. (1995), an aspect of organizational readiness for adoption is technological readiness, which consists of IT usage capabilities and the existence of IT management in an organization and, e.g., a sufficient level of IT expertise and a competent project management. Iacovou et al. (1995) also refer to financial readiness as the ability of a company to pay for the costs of installation, improvements in later stages of implementation, and usage costs, such as usage fees of the technology.

Top management support

According to a number of scholars, the support of management ensures that the technological and financial resources within a company are allocated in a manner that the adoption of technologies is made possible (e.g., Alsaad et al. 2017;

Damanpour and Schneider 2006). In their research, Alsaad et al. (2017) studied the adoption of B2B electronic commerce technology and referred to top management support as the extent to which the firm's leadership is devoted to the adoption of the technology and acknowledges its importance. Top management support is a powerful force pro or against the implementation of technology.

3.4 Marketing automation and cross-functional integration

The unalignment of goals and procedures of different organizational functions can cause a number of problems within the firm. A common example of this is the ongoing dispute between B2B sales and B2B marketing departments about creating and managing leads (Järvinen and Taiminen 2016). A study shows that approximately 70% of all marketing generated leads are ignored by sales representatives (Gartner 2002). The so-called ‘sales lead black hole’ (e.g., Hasselwander 2006) swallows a large share of marketing generated leads, which certainly is inefficient and leads to wasting a notable share of resources.

Developing IT solutions could prove helpful in encouraging cooperation between the two functions and improving lead follow-up. According to Wiersema (2013), marketing and sales systems integration could help marketing teams obtain deeper understanding of the data in the company’s CRM systems whereas sales representatives could learn about marketing efforts and the lead generation process. Marketing personnel are often intentionally excluded from sales management tools that sales departments employ, which makes sales and marketing systems integration essential (Kotler, Rackham, and Krishnaswamy 2006).

Companies in the B2B sector are paying increasing attention to marketing automation. Järvinen and Taiminen (2016) view marketing automation from the perspective of lead management and state that companies with marketing automation software offerings claim to help the user company to create a lead scoring and nurturing procedure that allows the company to enhance and accelerate its lead qualification processes. After successful lead qualification, contacts can be targeted with personalized and relevant content. If the tools do what they promise, marketing automation can be used to develop content marketing strategies that are effective and improve the lead follow-up process. (Järvinen and Taiminen 2016)

In Järvinen and Taiminen’s research (2016), the case company aimed at generating sales-qualified leads with a high quality. This would be done by adopting a new “data-driven marketing” philosophy to create and distribute content based on individual needs of the customers. The challenge of content personalization and delivering the right content at the right time was overcome by combining the right IT tools, marketing automation software, with content marketing principles. As a result, the case company was able to improve its customer communications, content delivery activities and lead prequalification and thus to increase the efficiency of marketing and sales organizations. Moreover, the quality and quantity of sales qualified leads improved, and the interaction between marketing and sales functions improved, as the effect of marketing contributions on the sales performance was made more transparent. As a result, the marketing department shifted from serving as a support function to acting as a strategic unit.

During the implementation process, differences in IT terminology understanding, data management and storing can prove to be challenging (Heimbach et al. 2015; Biegel 2009). It is important to guarantee tight collaboration between the IT function and the marketing team to overcome challenges of compatibility with other information systems used in the organization (Keens and Barker 2009). The importance of cross-functionality in marketing automation implementation is also recognized by Biegel (2009) who suggests including experts of marketing technology into the organization and making sure that everyone involved – internal IT, external help from, e.g., technology consultants, and the providers of the marketing technology – speaks the same IT related language.

Processes and a strong marketing function

In his marketing automation instructive article, Biegel (2009) suggests companies seeking profits and benefits from efficient use of marketing automation make sure that part of the marketing organization is granted the responsibility of marketing automation. This organization should be powerful enough to steer marketing automation implementation, have a wide understanding of the role of marketing in the organization, and ‘*a process-driven mentality*’.

In addition, Biegel (2009) mentions processes, suggesting the marketing automation implementation process should be led from the top by a Chief Marketing Officer with a strong interest for marketing automation implementation. The CMO should enable the creation of teams that, with a holistic approach to implementing marketing strategy, steer marketing automation development with a defined budget and clear key performance indicators.

3.5 Composing the framework: marketing automation in digital multi-channel customer experience management

As discussed, the potential role of marketing automation in customer experience management has been recognized by the academic community (e.g., Ginty et al. 2012). Thus, it is justified to research customer experience management, more specifically multi-channel, digital customer experience management with marketing automation platforms. Consequently, the framework of the study is composed from earlier discussed academic research and the most prominent managerial publications. Now, the elements of the framework will be addressed. The framework is once more presented in Figure 2.

Cultural mindsets toward customer experience management and implementation capabilities

According to the conceptualization of Homburg et al. (2015), there are cultural mindsets toward customer experiences, strategic directions for designing customer experiences and customer experience implementation capabilities that all have a role in a company’s abilities to successfully manage customer experiences. Most of the elements of the wide conceptualization were seen as a solid base for the research of this study and thus, picked to the theoretical framework of the research to section of multi-channel customer experience management. Out of the cultural mindsets, *touchpoint journey orientation* and *experiential response orientation* were picked to the framework. Two elements of the conceptualization were left outside. One of them was the cultural mindset of alliance orientation, as it takes into consideration the external relationships of the firm, while the aim of the case study is to create an image of the internal, current state of the company. For the scope of the study, also the touchpoint adaptation capability was left out. These aspects would have been interesting to assess, but are left for further research. Also, the element *Thematic cohesion of touchpoints* was re-named (now: *Visibility of brand elements in touchpoints*) for helping the reader of this study understand what exactly is meant with it. It and the rest of the strategic directions for designing customer experiences – the *Context sensitivity of touchpoints*, and *Connectivity of touchpoints* – were moved to the content creation capabilities section of the framework in the middle of the two main topics, as they are believed to largely consider capabilities that are related to content creation.

The need for touchpoint connectivity was also recognized by other scholars. For instance, according to Madaleno et al. (2007), both customer experience on single channels and multi-channel integration should be understood and optimized by companies that want to improve their customer experiences. The consistency of touchpoints thinking by Neslin et al. (2006), Payne and Frow (2004) and Madaleno et al. (2007) aligns with the research of Homburg et al. (2015) and is included in the framework of this study in the *Connectivity of touchpoints* element.

Content creation capabilities

In the framework, content creation capabilities are considered to be related to both customer experience management and marketing automation, because the need for content creation capabilities was also recognized by marketing automation academics. According to the research of Järvinen and Taiminen (2016), marketing automation could be used as part of the lead process of a company but would require creation and distribution of right-timed, personalized content. As delivering the right content at the right time requires content creation capabilities, in the framework of this study, they are in the middle section of the framework.

According to Payne and Frow (2004), a key to success in creating superior customer experiences may be the ability to consistently create an individualized relationship to the customer by distributing right-timed, personalized content. As content personalization capabilities are seen as a requirement for successful multi-channel customer experience management, *Content personalization and individualization* were added to the framework of the study, under the content creation capabilities alongside with other aforementioned content creation elements.

Cross-functional approach

As discussed earlier, managing customer experiences may be difficult, as decision-making and execution of activities easily happen in organizational siloes and by a number of organizational functions (e.g, Rawson et al. 2013). Also, the communication between companies and customers happens in many channels and through numerous touchpoints (e.g., Brynjolfsson et al. 2013; Verhoef et al. 2015). For these reasons, Edelman and Singer (2015) and Rawson et al. (2013) suggest that delivering positive customer experiences in the complex interaction environment requires integration of organizational functions. Thus, the cross-functional approach was added to the framework of the study, and one of its elements is *Sales, marketing, customer communication and product management alignment*.

The role of IT in customer experience management and marketing automation implementation has been discussed in different contexts. For instance, Ganesh (2004) suggested that IT has a role in multichannel integration and suggests that companies should invest in IT solutions that help with creating a single view of the customer to create competitive advantage. The IT function not only has a role in integrating the operations within a company, but also in offering a coherent buying experience across all channels and devices (Ganesh 2004). Keens and Barker (2009) also recognized the need for tight collaboration between the IT and marketing function to ensure system compatibility, and Biegel (2009) addressed the need for collaboration between internal IT, consultants, and the representatives of the marketing technology. Thus, a second element was added to the cross-functional approach section of the framework: *Marketing and IT alignment*.

Elements of successful marketing automation post-implementation

Some of the elements of the framework were drawn from general IT technology implementation research. From to the well-validated TPC model by Goodhue and Thompson (1995), *User attitudes* and *Task-to-technology fit* were added to the framework of the study to represent the prerequisites of successful marketing automation post-implementation.

In the paper of Iacovou et al. (1995), technology use skills and financial readiness for technology implementation were addressed. The general level of IT expertise has most likely improved since 1995 when the paper of Iacovou et al. was published, but in this paper, marketing automation tool using skills are not considered a competence that employees of companies with IT offerings by default have. The need for a defined marketing automation implementation budget was also recognized by Biegel (2009). Thus, *Marketing automation tool use skills* and *Financial readiness* were added to the framework as prerequisites for successful marketing automation post-implementation.

Top management support was recognized as a powerful force pro or against technology implementation by, e.g., Alsaad et al. (2017), and Damanpour and Schneider (2006). As the role of motivated top management in technology adoption is widely recognized, *Top management support* was added to the framework of this paper.

Biegel (2009) emphasized the important role of the marketing function in marketing automation technology implementation and the need for a '*process-driven mentality*'. Even though Biegel (2009) discussed the initiation stage of marketing automation implementation, post-implementation is supposedly a large project itself, and the need for *A strong marketing function* to steer the development as well as *Processes* that support the implementation were added to the framework of this study.

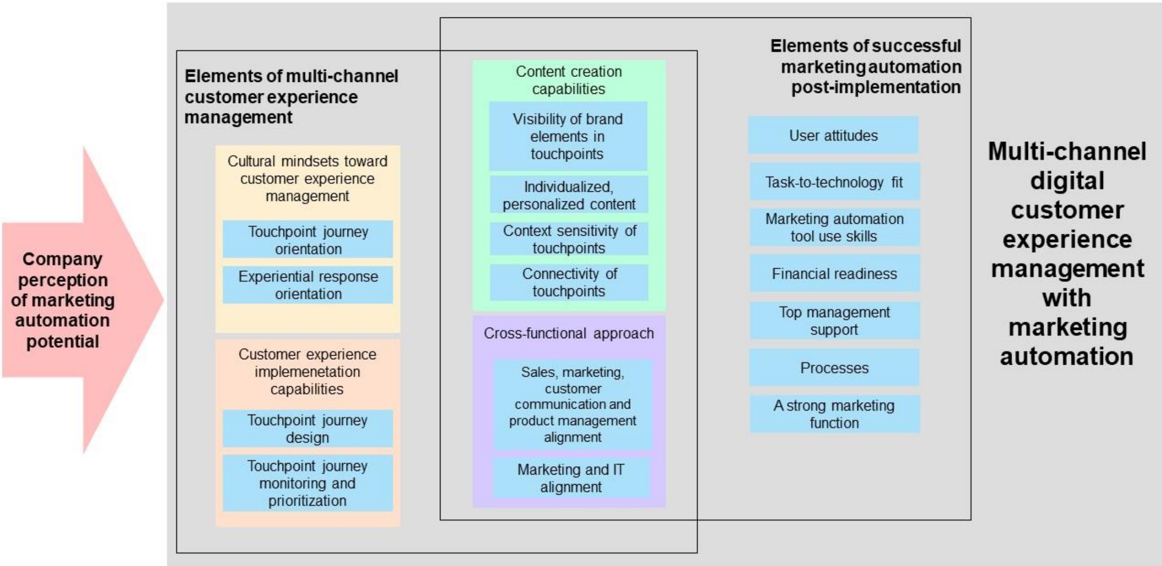

Figure 2. The framework of the study

4 RESEARCH DESIGN AND METHODS

Shah and Corley (2006), and Creswell (2014) describe qualitative research as a set of research methods that can be used for creating and examining theory on themes of which there is a limited amount of information available. This type of research is useful when studying marketing automation, since there is little academic knowledge on the topic and the aim is to build new theory and knowledge for further research. In this chapter, the empirical study conducted as part of the present research is introduced and described.

4.1 Single case study

A case study can be used to develop new theory because it can help identify variables and hypotheses (George and Bennet 2005). The case study research strategy is often useful when the understanding of the researched topic is limited or scarce (Eisenhardt 1989). Such a topic is marketing automation. In a case study, the data can be collected by hosting interviews, making observations, collecting answers to questionnaires or going through existing archives (Eisenhardt 1989).

A case study can regard one or many cases and in this study, the single study method is used, as the prerequisites for marketing automation use in multi-channel customer experience management is studied in the context of only one organization.

4.2 Data Collection

In case studies, a common method for acquiring historical information is interviewing, in which the researcher creates a list of structured questions and allows the interviewee to answer them based on their own perceptions (Creswell 2014). The purpose of a research interview is to gather relevant, valid, and reliable data that supports answering the research questions defined for the study (Saunders, Lewis and Thornhill 2015). Thus, interviewing was selected for collecting the data for the empirical section of this qualitative case study.

More specifically, the interviews were semi-structured. In semi-structured interviews, the interviewer has a list of themes to be asked about, supported by a list of key questions, and the collected data is usually qualitatively analyzed (Saunders et al. 2015). Semi-structured interviews are advantageous in certain circumstances: for instance, when the number of questions to be answered is high or when the questions are open-ended and multidimensional (Saunders et al. 2015). As these circumstances apply to the setting of this paper, the use of semi-structured interviews is even more justifiable.

A list of interview questions (Appendix 1) was created based on the framework of the study. The list is modular: in the spirit of semi-structural interviews, not all the questions were asked in all the interviews. Instead, key questions were picked for each interview based on the position of the interviewee in the case company and his or her daily work tasks and responsibilities. The questions were used to bring structure and direction to the discussions, but depending on the flow of the session, the order of the questions was changed. Some of them were not asked, if the themes had already been covered during the interview.

To create a comprehensive image of the company's prerequisites for managing multi-channel customer experience with the use of marketing automation, participants from different parts of the company and from different levels of the organization were selected. For the scope of the study, the number of participants was limited to 7**,** and thus, members of the organization with potentially broad know-how around the topics were selected. Table 1 presents the roles of the interviews and their locations in the organization of the case company. The interviews took place at the headquarters of the case company during October and November of 2019. The lengths of the interviews varied from ca. 24 to 50 minutes and are also presented in Table 1. In the table as well as in the remaining chapters of the paper, interviewee ID's will be used instead of using the real names of the participants. This is done to respect the case company's wish for remaining anonymous.

Interviewee ID	Role	Location in organization	Length of interview
A	Copywriter	Online sales	32:12
B	Business lead	Online services	48:13
C	Top management leader, marketing communication and development	Marketing	44:12
D	Marketing automation developer	Communications	46:51
E	Online customer experience manager	Online services	35:25
F	Head of customer communications	Customer communications	49:49
G	Top management leader, sales	Sales	24:14

Table 1. Summary of the interviews.

To enable data handling and analysis, the interviews were recorded and transcribed into text. The transcriptions were carefully read through and a summary of each interview was made to get an overall image of each interviewee's main thoughts. The transcriptions were then analyzed by classifying the generated content into categories that correspond the themes and research questions of the study.

5 RESULTS

In this chapter, the collected interview data is presented. The transcription material has been re-organized and will now be presented in relation to the framework of the study.

5.1 Case company and its marketing automation history

The case company is a Finnish, publicly listed provider of a variety of connectivity, IT, and other digital services with a turnover of more than 1,5 billion euros annually and with thousands of employees. The company is a market leader in some of its business areas. The company mainly operates in Finland but also has operations abroad.

The marketing automation tool has been put into use at the corporate customers business unit of the company and thus, the interviewees represent the B2B side of the company. However, the discussions sometimes involved mentions of the consumer business and information regarding the other side of the corporation was also utilized in the research when necessary.

According to the interviewees, the investigated business unit of the case company has been utilizing marketing automation already for a few years. However, the company has switched to the new marketing automation tool a few months ago as the use of the previous tool has been permanently driven down. The previous tool was used for building independent, automated purchase journeys for a selection of products in line with general content marketing guidelines. A marketing qualified lead showed interest in a product or service by visiting its website and accessed the email journey by, e.g., downloading a PDF guide with product-related information. According to interviewees B and D, the use of the previous marketing automation tool was driven by one employee and upscaling the use was mostly dependent on how much time the employee could spend in developing the use alongside other tasks. Thus, the marketing automation tool was used for building purchasing journeys for a small range of products as well as as a general email marketing tool for sending newsletters and invitations to events and webinars.

According to interviewee B, there was no official ownership of or defined processes for marketing automation. As the employee driving marketing automation exited the company, a large share of the understanding of the previous marketing automation tool left. Before the exit, the initial purchase of the new marketing automation tool was made. According to interviewee D, it had been noticed that there was no real integration between the previous tool and the CRM system of the company and no functionality for automatic updating of contact lists:

“If there is no data transfer automation to the CRM system and from the CRM system to the marketing automation tool, you do those things practically manually while calling it marketing automation.”

The new marketing automation tool consists of several applications, all of which account for a part of a multi-dimensional multi-channel marketing hub. In the marketing materials for the platform, the provider draws an image of a futuristic, complete customer experience management platform that any company can use to manage the complete digital customer experience and communications in all of the digital channels. However, to create such a platform, the user company has to conduct the full stack of applications.

According to interviewee D, besides the platform layout, the case company has thus far implemented seven elements: an email marketing application, used for building and sending out emails; a mobile messaging application, used for creating and sending out SMS messages; a lead form platform, which enables embedding lead contact collection forms to social media channels; a landing page application, with which simple forms and webpages are created for, e.g., collecting webinar registrations; an analytics application, used for analyzing, e.g., email data; a journey application, used for building and controlling automated customer communications journeys; and an automation application, used for data transfer from the CRM system to the marketing automation platform and back.

As interviewee D describes, in addition to the already implemented applications, under implementation is a dashboard application for combining data from marketing, sales and the websites and creating a visual funnel view, and the acquisition of a data management platform (DMP) as well as an interaction visualization application are under discussion. The DMP could be used for combining identified and unidentified data to improve targeting on the website. Eventually, with the interaction visualization application, the whole customer experience and all of the digital and offline touchpoints and the movements of customers between the touchpoints could be visualized for understanding the lifecycle of the customer. Thus, after the implementation of all the applications, the provider of the marketing automation platform claims it could be used for holistic customer experience management.

The new tool has the CRM integration functionality, which is, by several interviewees, named as the most notable advantage of the new tool. At the beginning of this case study, the previous tool had just been driven down, and the new tool was already up and running, but only small steps had been taken toward utilizing the full power of the expensive tool. How should the company get organized for successful post-implementation of the new tool? Were the prerequisites for using the tool for what it is ultimately meant to be used for – digital multi-channel customer experience management – there?

In this section, the interview data analysis is guided by the framework of the study presented in chapter four. The analysis begins with elements of multi-channel customer experience management: cultural mindsets and customer experience implementation capabilities. Then, the elements of successful marketing automation post-implementation are analyzed based on what the interviewees told. After that, what advances both multi-channel customer experience management and marketing automation post-implementation – content creation capabilities and having a cross-functional approach – are analyzed. Before the analysis guided by the framework, general perceptions of the interviews of marketing automation will be discussed to provide a solid basis for understanding the phenomena in the case company.

5.2 Interviewee perceptions of marketing automation

Before asking the interview questions based on the framework of the case study, the participants were asked two questions:

1) **What is marketing automation?**
2) **What is marketing automation in the B2B business unit of the company?**

This was done to form an image of whether the idea of managing the overall customer experience with marketing automation was at all agreed upon by the members of the organization. If there was no notion of the possibilities of marketing automation in customer lifetime management or multi-channel customer experience management with a marketing automation platform, there would be no justification for learning about the more specific elements of the framework.

In general, the perceptions varied, likely because of the varying titles of the participants and their marketing automation experience. Interviewee B approaches marketing automation from an operational point of view:

"We should be able to generate leads to the sales, we should be able to send personated messages, sell directly and conduct customer communications. And to use it as a platform for building and implementing customer journeys. Many opportunities, but target group specific communication is an important one: that we wouldn't send everyone the same message but we would utilize the CRM data in personalization."

Interviewee C approaches marketing automation from a revenue point of view: everything is linked to sales and increasing revenue, and there are three ways of increasing revenue – by generating sales, automating manual processes, and increasing customer retention. C has a strong idea about using automated customer journeys for churn reduction: not all journeys have to be directly commercial, but essentially, the reason for the existence of the organization is to create value for the business owners by increasing margins.

Interviewee D has an idea of what marketing automation is not:

"It's not about automating all marketing. I think the idea of marketing automation is to teach the machine to do frequent tasks to release the time of marketers to iterate and to test. Even though marketing automation conducts sends or creates leads automatically, the idea is not to leave it up and running alone – it requires constant development and updates."

At the same time, D states that the company is, indeed, moving toward customer lifetime value management with the use of marketing automation and feels positively about it. In D's opinion, the company could orchestrate the whole customer lifetime communications, from the first impression to aftercare of a purchase. According to D, marketing automation is actually customer lifetime management and even though marketing is highly involved, it can't take the whole role.

However, the shift to full customer lifetime communication management with the new marketing automation tool, according to D, requires the deployment of the full *"stack"* of the selected marketing automation tool, which will happen only after a year or two, and to genuinely use the tool as a multi-channel customer experience management platform – that is, controlling all email communications, social media marketing, order confirmation communications, online channel visibility, etc. within the same system – takes even longer, if it ever will happen:

"We're going to the right direction, toward the role that I think marketing automation should take, but whether we'll ever make it to the head goal is a question mark."

Interviewee E agrees with the ideas of individualized, personalized communication and cross-functional nature of marketing automation as well as G, the sales leader, strongly repeats the same thoughts and ideas as D. G has seen how marketing automation should not be conducted: bad targeting and mass distribution of messages can hurt the image of the organization. Instead, marketing automation should work as an activator of different organizational functions to create superior order-to-customer service:

“In my opinion, marketing automation is – an old term. - - At its best, marketing automation means providing next best action guidance, exactly suited for that one specific customer, supported by utilizing data from internal and external sources. And to conduct all of these actions at the right time, personally, and in a way that includes intelligence, from sales to delivery to being a user of customer service to, perhaps, purchasing additional services – during the whole customer lifetime.”

5.3 Cultural mindsets toward customer experience management

As described earlier, according to Homburg et al. (2015), customer experience management can be viewed from the point of view of cultural mindsets. The two cultural mindsets that were chosen to the framework of this study are *touchpoint journey orientation* - understanding that knowing where the customer is coming from and where he or she is going is an important element of building positive customer experiences. *Experiential response orientation* is about understanding the sensory and affectively stimulating nature of some customer experiences and that they can be hard to measure.

Touchpoint journey orientation

All of the interviewees were asked about their touchpoint journey orientation: whether they view customer experiences as a continuum of moving from one touchpoint to another. All of them agree with the mindset of shifting from viewing individual touchpoints to viewing whole customer journeys: either purchase journeys or customer lifetime journeys. However, they also stated that on an organizational level, making the mindset a reality has not yet been so successful.

There were differences in on what level the interviewees perceived customer journey orientation, possibly explained with their position lower or higher in the organizational hierarchy. Interviewee A, the copywriter, sees customer journey orientation as proneness to plan journeys around a specific theme or product:

“When new articles are written and published [by us] about, for instance, the product offering of device manufacturer X, we could share different articles to customers who have bought computers than to those who have bought both computers and mobile phones. To think about our content distribution according to the needs of different target groups.”

Both interviewees C and G, the sales leader, see journeys as a matter of an organization-wide mindset. C states that in the organizational structure, the customer could have a more central role:

“For us [at the B2B customers unit] it has been quite sales oriented – at the moment, we’re applying a bit of marketing and customer communications – we should have the customer as the ‘main topic’ and below that we should have marketing and sales. - - It’s not a bad idea to build these operations on the journey of the customer.”

G agrees and presents an example of how touchpoints should be connected to each other, hinting that, in the company, this kind of a narrative is not the reality yet:

“A sales person at our contact center calls a customer who is digging a ditch in Sotkamo. The customer tells that he doesn’t have his contracts with him at the moment and can’t remember the terms and prices. It’s a good conversation and they agree that he will be called again in a week so he will have time to find the papers at home. However, on the way home, he remembers that there is our shop in the regional center and decides to drive there to continue the conversation. Ideally, how things should already now work, when the customer goes to the store in Kajaani, the salesperson there sees that he has been called today and he’s been made an offer. The service encounter can continue from where it was left in the previous touchpoint. The customer still decides that he wants to think it through at home and

as he opens his laptop and visits the website of a local tabloid, there is our banner waving at him and thanking him for visiting earlier – would he like to accept the offer now, online? - - It is crucial that we understand the journeys the customer goes through. What happens in the customer."

According to F, the new marketing automation tool could be a reason for viewing the relationship to a customer differently:

"After all, it's just a system and although it's very good, we still have to learn to see our communications and the customer differently, possibly through the customer journey mindset. It could be a common framework, and for that the new tool can be brilliantly good. It could be a template for doing and thinking."

Experiential response orientation

The head of customer communications, interviewee F, was asked about affectively stimulating or feeling-evoking communications. According to F, experiential response orientation is represented at the company more and more in the course of time. Moreover, all communications should aim at evoking emotions: at minimum, an informational message should be able to evoke a feeling of *must* if something is expected from the customer.

The company also has a specific program for customer care communications: thanking for being a customer and surprising customers positively with messages with a discount code or a gift and without any commercial agenda. Also, customer-specific greeting messages from the responsible sales person are sent to evoke feelings of familiarity with the company.

5.4 Customer experience implementation capabilities

Firm capabilities of customer experience management manifest the other aspects of customer experience management: cultural mindsets and strategic directions for designing customer experience. *Touchpoint journey design* is about planning and modeling business on the basis of touchpoint journey design. *Touchpoint journey prioritization* means allocating resources and being able to direct and adjust touchpoints. With *touchpoint journey monitoring,* firms assess the performance of different touchpoints.

Touchpoint journey design

Interviewee B is in charge of an extensive website renewal project in the business unit. B raises up the capabilities in building purchase journeys when the previous marketing automation tool was in use. B states that it would have been possible to scale the journey model to other products, but from a resource point of view the investment wasn't big enough: the person driving marketing automation didn't have enough capacity to put into implementing the model on an organizational level. According to B, the touchpoint journey mindset and new ideas related to it are accepted by members of the organization, but as everyone is busy with the current workload, journey thinking is easily pushed aside if there is no clear ownership of it.

As part of the website renewal project, building customer journeys has been written into the plans and collaboration with the marketing team has started. However, the journey building will happen only after the most urgent website content updates have been done and a joint content calendar between the online team, communication and marketing will be created, after which journey building will be more streamlined, states B.

According to B, a shortcoming in the company's customer experience implementation capabilities is the website structure. As part of the website renewal project, a goal is to create a content strategy and to think through the whole online hierarchy and structure of the different online platforms. However, there is a need and a pressure for building product awareness and creating leads by creating new content and findability. Under such pressure, the website renewal team is in a risk of doing before planning and forgetting to see the big picture, which, according to B, has happened before:

“While we are obliged to be moving forward, we have to simultaneously start building a plan and thinking how we want to carry the customer on the website. By utilizing and testing scientifically proven data about how potential customers feel about certain types of page navigation. - - We know what we should be doing but we have to change our way of working to enable using that information. That is quite a big challenge at the moment.”

According to interviewee E, the online customer experience manager, the company has been taking small steps toward implementing the touchpoint journey mindset but is at an early stage. E emphasizes the need for building the journeys together: there is still a lot of siloed thinking. This thought of doing together is also supported by F, who brings up the example of communications to a new customer:

“- - after acquiring a customer, we wish him or her welcome with this so-called onboarding communications – “we’re glad you became our customer*”. We guide him or her to a few customer contact points where they can go next – self-service, or self-service for employees of the customer companies, or our IT service for corporate customers. Or if they have bought a product, we’ll show the way to related guides, or webinars, or other existing content. This is what we have to do together. It’s not only the job of the customer communications unit. It requires understanding the whole journey and life-cycle.”*

The potential of the new marketing automation in implementing the touchpoint journey mindset is seen by most of the interviewees. For instance, according to G, the sales leader, the communication in the journey from evoking interest in the company’s products to making customers buy them should strongly linked to marketing automation.

Touchpoint journey monitoring and prioritization

In the website context, customer data of the case company is gathered and analyzed in several ways. According to D, the marketing automation developer, the new marketing automation tool uses data about purchases, customer service cases, leads, webinar registrations, and newsletter subscriptions. All of this data is identified: it is known who the user is. On top of the identified data, there is an enormous potential in combining the identified data with unidentified website browsing data. This will not be possible before deploying a data management platform (DMP), which, as an implementation project, requires tens of thousands of euros of capital and building a data model for transferring data between the CRM system and other sources.

According to interviewee D, data is largely gathered and viewed, but a challenge is that each online touchpoint and source of data has its own analysis system. If a customer visits the web shop, data is analyzed with an analytics tool that doesn't allow identifying the customer. Sent email messages have their own, surprisingly old-fashioned analysis tool within the marketing automation tool, which doesn't allow profound analysis. A large and important share of the data is CRM data stored in the CRM system of the company, but it has its own problems:

"If there is a peak in online sales, for instance, we sell a lot of a specific smart phone model, and at that time we've conducted an email marketing campaign for that model, we can always guess that the peak was generated by the campaign – but we will never know for sure."

According to D, the DMP deployment project should offer a solution to the unawareness: a funnel visualization of the three data sources should help the company understand what exactly happens and where. However, the deployment of the DMP requires harnessing all of the applications of the marketing automation tool, which, with the current speed of marketing automation development, is not possible for at least a year, says interviewee D.

Interviewee E is responsible for monitoring and reporting the online customer experience. In the case company, the quality of online customer experience is measured with Customer Effort Score (CES), which measures the ease of online service to the customer. The survey is given to every online visitor who has filled in a lead form, logged out of the customer service portal, or ordered an item from the web shop. In addition, on all the other pages, the survey is shown to a share of online visitors. A unified score is calculated and its cumulated three-month value is reported as part of the business unit's balanced score card. On top of the unified score, scores from the individual measuring points are monitored and analyzed by interviewee E on a weekly basis.

5.5 Elements of successful marketing automation post-implementation

According to the framework of the study, elements of successful marketing automation post-implementation are user attitudes, task-to-technology fit, use skills, a strong marketing function, processes that support the marketing automation development, financial readiness, and top management support. When the interview data was handled, it became clear that the attitudes of the interviewees toward marketing automation in general and toward the marketing automation tool were closely linked to discussions about the task-to-technology fit of the tool and to perceived marketing automation use skills. Thus, interview data about these elements was merged. Also, when processes were discussed, a wider conversation about the leadership and ownership of marketing automation and its development arose.

User attitudes, task-to-technology fit and marketing automation use skills

The level of use skills among the interviewees varies from no experience at all to being the head of the technical development of the platform. C, the marketing communications leader, has no personal experience of the use of the tool but describes the positive attitude toward the marketing automation tool as follows:

"I know the CRM system [the tool is linked to], but I personally haven't used the marketing automation tool – but I've been convinced by everyone that it is a better tool for our use than the previous platform. And I've seen the logical structure and I have high expectations for getting something out of the machine."

The marketing automation developer, interviewee D, is naturally familiar with the tool and, as the main user of the tool, has an overall image of user attitudes and skills. D states that, when it comes to task-to-technology fit, the CRM synergy and automatic data transfer between the tool and the CRM system are without doubt a great indicator of a good fit to what is planned to be done with marketing automation in the company. However, to make real use of the CRM data in marketing automation, it should be made visible: there is a lot of data that isn't stored anywhere at the moment or is stored but is not utilized – data about sales leads, opportunities, and the mass of unidentified data: site visitors, social media interactions, discussions the sales people have in events, etc. According to D, to make real use of data in the CRM system, it has to be unified with a lot of other data.

According to D, in the current situation, the new marketing automation tool is slightly too sturdy: the full capacity of contacts or customer journeys isn't put to use. For the email communication purposes of marketing and the online team, a simple combination of the previous marketing automation tool and another email marketing tool could still be enough. However, the new tool is already been used for and perfectly fits automated transactional order confirmation communication, which the previous tool could not do. And, according to D, there are already some trial cases of utilizing the contact list update automation functionality the new tool holds. As D comments on the task-technology fit and user attitudes toward the new tool,

"It fits well, and will fit even better the further we go. But at the moment, we're still taking baby steps, and I can sense some inertia and comments that the system is quite heavy for what it is being used for at the moment – but that kind of an attitude, I think, depends on the skill level of the user."

According to D, the general marketing automation tool know-how of the users is on a basic level and in line what is expected from a user who conducts the simple daily tasks with the tool. The users know how to create and send email messages, build journeys, and some of them know how to analyze the results of their own actions. Data management requires more training, and D states that the more people use the tool, the mole secure they will feel about their own skills.

According to D, the attitudes toward the new tool have been positive and people have been keen on using it. However, the users don't necessarily understand why some of the functionalities aren't as straightforward as in the previous tool: some things have to be done in a more complex way. D also admits that there are some inconsistencies in the tool that, at some points, complicate its use.

What comes to multi-channel customer experience management with the use of marketing automation, D believes in the fit of the chosen marketing automation tool:

"At best, we can manage our email marketing, order confirmation messaging, online channel visibility, social media marketing, it's all achievable for us. But it requires large investments, time and doers. And [the marketing automation tool] certainly works for that better than many other systems, I don't believe there is any sturdier tool in the market at the moment."

Interviewee F has received a training for the email marketing use of the new marketing automation tool but as head of the team, doesn't personally use the tool on a daily basis. According to F, the attitude of the customer communications team toward the new tool is very positive: a massive share of the communications earlier conducted manually and from several communication tools are being transferred to the new marketing automation tool, which, in the long run, should extensively streamline customer communications. While the tool will be widely used and have an important role in the operations of the team, its use will also increase the workload of the employees: as communications from different parts of the organization are combined and brought *"under one roof",* the team will be responsible for taking them over, too.

The team of interviewee F has faced some unpleasant surprises regarding the task-technology fit related to the complexity of the tool and its usability. For instance, it turned out that switching between the three languages that messages are sent in requires coding, which cannot be done by the team itself but with which the outside consulting partner has helped. Another surprise has been the complexity of building the very automation: for an automated process for communication related to one product line, some 16 journeys must be built, which doesn’t show to the customer but equals a tremendous amount of work and capacity from the system. However, in general, F thinks that the new marketing automation tool is a system among others and as time goes by, its use will get easier. As long as there is enough available user licenses and capacity for sending emails and SMS messages, everything should be fine:

“I am trusting that the system has been sufficiently tested in the course of years and that it’s been used by large companies and that the functionalities have been well thought through.”

A strong marketing function

According to interviewee C, the marketing communication leader, the marketing team has not had a driving role in marketing automation development in the past. Surely, the members of the team were involved in content marketing related to the previous marketing automation tool, but the direction for the development was not given by marketing. For instance, the purchase of the new tool was not in the hands of the marketing team.

As the implementation process of the new marketing automation tool was initiated, the previous leader of the marketing team started a project of taking over ownership and leadership of marketing automation development. However, while agreeing with the main ideas and goals behind the project, C thinks it could not be implemented in a successful manner. There were constrains of a large organization: C believes that it would be better to make the changes iteratively and by justifying them with quantitative testing of the actual financial effects by experimenting on smaller populations. Marketing should take a stronger role but also be ready to take responsibility for fulfilling the goals set for marketing automation.

Now and in the future, C believes the marketing team is taking a stronger approach to marketing automation development. A new way of working for the online team of the business unit has been under development, and as part of the development process, a marketing automation development group has been formed. The setup of the new virtual team is cross-organizational. It brings members of different parts of the organization together to think about joint rules and ways of working for efficient marketing automation tool use and development, but no official ownership of the development has been given to the team or its leader. A member of the marketing team has a development role in the virtual team with some of the weekly working hours dedicated for the task. Also, a steering group for marketing automation development has been formed this year, and as the leader of marketing communication and development, interviewee C is involved in the group.

Processes, leadership and ownership

When asked about marketing automation processes, all of the interviewees bring up the same thoughts: while marketing automation, or at least what the interviewees believe should be done with marketing automation, is connected to several internal processes, there is no process for marketing automation or its development. When asked about the processes marketing automation is interconnected with, interviewees present parallel ideas.

According to C, the marketing communications leader, marketing automation is, first of many, part of the lead process, where potential leads are transformed into marketing qualified leads that are transformed into sales qualified leads and directed to sales for further contacting. There, the role of marketing automation is to help in conversion: for instance, wherever the marketing lead originates from, the marketing automation platform is a tool for nurturing it and sending email messages with further information about a product the customer has showed interest in, automatically tracking the responses of the recipients to those messages, and creating an automated transfer of lead data to the CRM system. From there on, the sales people are responsible for contacting the customer and closing the deal. C states that the whole lead process is under renewal and as part of the renewal, marketing automation should be included in the process map.

What comes to marketing automation as a platform for managing the customer lifetime journey, C describes:

“Since we have no process for customer communications, we need to see the customer as part of all of the different processes. We have more than ten core processes – and that [marketing automation] is in a way connected to the delivery process, because when we automate something, we have to be sure that when a lead is created, someone is there to actually deliver the product. So, it’s linked to many of the core processes – billing and after billing, upselling and then sending an invoice for that and delivering the product, and to have the readiness for customer service, or if an error happens in delivery, we have the visibility to that and a process for fixing it – there’s always room for a process walkthrough. - - We should draw a blue print of how marketing automation is connected to the core processes.“ → “Läpikävelyä ei voi tehdä koskaan liian monta kertaa”

Interviewee G agrees with the thoughts of C: if marketing automation means managing the whole customer within a platform, it is connected to several processes, albeit not all:

“All of the processes that require interacting with the customer, or all of them where customer interaction happens, throughout the whole customer lifetime. Then there’s a group of internal operational development processes that I don’t think are related. But everything that in any way includes customer touchpoints, implemented with any medium. Either digital or physical.”

When discussing the processes, thoughts about the ownership and leadership of marketing automation arose. The earlier-mentioned steering group and virtual development team were mentioned by most of the interviewees as the primary leading forums of marketing automation and its development. However, concerns about the lack of official ownership were experienced by many of the interviewees. The technical development of the marketing automation tool and the technical implementation of many of the marketing automation cases are in the hands of interviewee D, who is also responsible for communicating the activities to the steering group and other stakeholders. D is also part of the virtual development team and makes the prioritization and acquisition proposals to the steering group.

A role has been given to an external consultant partner. Its team is responsible for conducting the most demanding technical development projects, and they are directed by interviewee D. According to D, the consultant partner has been very useful at technical implementation and giving directions about what the marketing automation tool can be used for in the context of the case company. However, the partner has not offered a more profound approach to the strategic use of the tool, thus far:

"Actually, just today I talked to them about the big picture and what we should do [with the tool] next year. Sure, from their point of view it's a lot about what they want to sell us, so we have to stay critical."

Regardless of the strong role and resource allocation of interviewee D in the technical development of the marketing automation tool, according to D, the official ownership of the tool is in a whole another organizational function, business development. However, there, too, there is no specific responsible, and D believes that the real decision making power is owned by the earlier-mentioned steering group consisting of members of all the functions that utilize marketing automation. D believes that because of the cross-functional nature of marketing automation, it is maybe not even possible to give the ownership to someone or to one function:

"With me, the ownership [of technical development] moved back to the general communications organization, which means that it is not under any B2B stakeholder function, which is good – because if it was owned by, for instance, the online team, in an extreme example, its leader could decide that 'this is my tool, we will use all of its resources to answer to our objectives'. Or if it was owned by customer communications with a tremendous need for marketing automation resources, they could decide to put everything else to hold."

B, the business lead responsible for the large website renewal project, has been selling marketing automation services to customers and is familiar with consulting the implementation of marketing automation tools. B hopes that there would be a strong partner to help lead, a clear plan for, and clear ownership of the post-implementation to avoid repeating the mistake of not utilizing the full capacity of the marketing automation tool:

“If there is nobody to lead this… How it easily goes is that all of them [members of the development group] rise their hands up as soon as they come across any difficulties – “it’s not my job, somebody else take care of it”. If it’s not under one person’s control, there’s a big danger of repeating the same mistakes again.”

The confusion with the leadership of marketing automation is also recognized by C:

“The leadership of this has been unclear. Now there’s the steering group, but until now its role has been very technology-oriented and what we’ve discussed are the marketing automation cases the sales team wants to conduct. I hope that in the future, we’ll use the forum for mapping all of the potential marketing automation cases, discussing prioritization and that we manage to bring the customer lifetime journey view there: add softer values to the cases, not always looking for sales and quick financial results.”

Besides unclear ownership, another aspect affecting the leadership of marketing automation is the visibility of activities. According to C, it’s not enough that the person responsible for a specific marketing automation case or for the technical development of the tool knows what the results are: it is equally important that the marketing communications leader C, the sales team, and the customer service team all have the visibility to what is being done and how everything goes. Without visibility, leading the development is difficult, states C.

F is really content about the formation of the virtual, cross-functional development group and believes that it is what is needed at the moment: the use of the tool is at a very beginning, but some experience has been gained and can now be used in the development. However, as the others, F also calls for real ownership of the tool and agrees on the difficulties in coordination:

"If we view the customer lifetime journey as a subway map, how can we see the whole image, how do we prioritize? At what point do we put a [email] journey to hold, whether or not it is really important? There will be so many needs from all parts of the organization. - - Maybe the steering group could create the conditions and sidelines for the development, and in the virtual development group we could decide what to do on a more tactical level. But somebody has to own the customer lifetime journey approach and I don't have an answer to that."

Interviewee G emphasizes the role of customer value in marketing automation decision making: what is done with the tool should be done in regard with the value the customer perceives. At the beginning, the most important step is finding an unified model of operating in a manner that creates customer value instead of aiming at increasing the volume of marketing automation cases:

"Volume can't drive the activities. From the position I'm in, I'll do my best to make sure that we're going into the direction of using marketing automation for adding value. We must experiment the model of customer value creation and once we know how it's interconnected with the real world customer interaction, sales, transactions, buying, services with us – then, we can scale up. Let's not mess up our contact base before that."

Financial readiness

According to interviewee D, the financial needs of marketing automation development consist of two sections. Licensing costs consist of, e.g., acquisitions of the new applications to the platform and of email and SMS message quotas, and user licenses. The second section, human resourcing costs, consists of the indirect costs of allocating internal human resources to the tasks and of external working hours bought from the partner. D states that even though the first mentioned section can rise up to hundreds of thousands of euros yearly, the need for these investments is well understood by the people making the investment decisions and no problems in finding the funding have been faced. Same partially regards the second section:

there have been situations where money for the collaboration with the partner has been sought after but eventually catered for.

Interviewee D mentions the visibility of the activities and results as a potential problem regarding the funding. At the end, the money is allocated by the executive groups of the business units. In a scenario where funding would stop, there would be a need for showing what has been done and with what investments, and what will not be done if the funding stops. As D describes the general financial situation for marketing automation development:

“The budget needs – they are recognized, they are under discussion, and as far as I know, funding will not be an issue at least next year.”

Interviewee C is more concerned about the sufficient funding for scaling up marketing automation activities. C believes that the funding needed for buying and creating expertise on the matter will be relatively easily found, but a major issue is that money for the development of the platform comes from the general IT investment budget of the company. If large marketing automation investments have to be made, the fight for budgets will be fought with other large IT investments made by the company at the moment and in the near future.

Deploying the DMP and building a data model for using it would be a very large marketing automation investment, states interviewee D. However, the need for it has been recognized in many parts and layers of the organization, and D is not concerned about finding funding for it. Collaboration with the B2C business of the corporation could help in finding the budget for the acquisition:

“Do I believe that we will acquire it? I’m hopeful and optimistic. There’s a large demand for it here, and I’m sure the money will come from somewhere. Then there’s the need of working hours to implement it, but as the need is recognized on the B2C side, too, resourcing should be a bit easier.”

Another challenge regards the human resources, which can be viewed as indirect financial investment. Interviewee C believes that scaling up the now-conducted marketing automation activities and development with the current amount of allocated employees is not plausible. Because of the challenges, C once again emphasizes the need for proofing the efficiency of marketing automation and profitability of the made investments by experimenting with smaller target audiences:

"With the current task force, it's hard for me to see that we could scale the activities up. We still have to experiment, and when we find out that something went damn well, and we should do more of this – what then? We'll run out of the working hours of the people. For this kind of small-scale testing and doing this is enough but if we want to scale up we'll need large investments, which takes us back to the idea of experimentation and proof of profit."

Interviewee F, who leads the customer communications team, also has concerns about the sufficiency of working hours. Until now, there have been enough resources for conducting the needed marketing automation activities, but already in the coming year, the team will likely run into problems with limited resources. As activities are more and more conducted in the marketing automation tool, the workload of the team doesn't diminish but grows and strict prioritization is needed.

Interviewee D believes that the resourcing situation is getting better:

"For a year, I was quite alone with implementing the activities from start to end, except for content creation. But now there's starting to be a lot of people with marketing automation skills and my job there is more on the testing side. The more we do, the more skilled people there are."

Top management support

According to interviewee C, the two core business units have their own needs. Consequently, in the course of time, the development of marketing automation technologies has happened independently by the two executive groups: the one of the B2B business unit and the one of the consumer business unit. While marketing automation is supported by the top management and the financial benefits of efficient marketing automation are understood, marketing automation is conducted with a whole another IT ecosystem on the B2C side than on the B2B side. C states that the use of the new marketing automation platform should help the two business units find a new, unified way of conducting marketing automation.

Interviewee D agrees with the general positive mindset toward marketing automation. D states, despite not having a more profound image of the top management attitudes toward marketing automation, that the messages about marketing automation that have been delivered from the bottom up have been received by the directors positively.

Interviewees C and G represent the people of the executive groups of the case company. The data collected from the discussions with D and G itself serves as an example of top management attitudes. While G presents earlier-mentioned concerns about the wrong kind of use of marketing automation – mass messaging without real targeting or intelligent use of recipient information from internal and external sources – the attitude toward using the marketing automation tool as a platform for multi-channel, customer-centric communications tool is very positive and the benefits of such use are recognized.

Interviewee E believes that there may be a positive mindset toward marketing automation, but the understanding of the requirements for efficient implementation might not be clear:

“There might be strong visions that this [marketing automation] will save the world. Maybe there’s no precise understanding, and probably doesn’t have to be – but the message has to be very clear from the bottom of the organization to the mid-level to top management: making the automation work requires a lot of work from us. It [marketing automation] will make great things possible but along with that, more resources are needed.”

5.6 Content creation capabilities

According to previously conducted research, both multi-channel customer experience management and successful marketing automation post-implementation require content creation capabilities: using the brand as a tool for creating unified, coherent content, regarding the context sensitivity as well as connectivity of touchpoints, and producing individualized, personalized content.

Visibility of brand elements in touchpoints

The interviewees were asked about the brand elements and their visibility in the produced materials for all the used channels with a goal of understanding whether the brand can help in managing a unified multi-channel customer experience. Based on the interview material, there are varying thoughts and ideas of what the corporate design is and how it is visible in the produced content. One aspect is the uniformity of the B2B brand with the general company brand. Another is the coherency of the B2B brand.

According to interviewee A, from the point of view of the customer, recognizing the B2B brand has become easier during the past year. However, some of the campaigns have their own look and feel and only the logo tells about the company. Usually, a B2B stamp is added to the materials to help identifying the content as something created for the corporate customers, but not always.

When asked to describe the company brand, F states that the brand is about making the recipient of any message in any channel see instantly who sent the message. The message itself should carry out the value propositions and brand guidelines set on a company-wide level, but the implementation of the message has an important role.

Interviewee C, the leader of marketing communications, states that unifying the customer experience in different channels comes down to the use of brand. There are certain guidelines for the use of the brand: e.g., the logo is always written in the same way. However, the B2B marketing thus far not focused on brand marketing. Instead, the focus has been in events and single marketing activities:

“I asked our marketing partner to show me a collection of the visuals we have created in the past year. We are an all-round ICT house and provide a number of solutions. As a result, it looks pretty mixed. The logo is there and the colors are there in the big picture, but the means of storytelling naturally vary. - - The unity of touchpoints lays in the basic brand guidelines.”

According to C, the brand is constantly supervised, and at the moment, another brand survey is in the making with a goal of creating an image of how the members of the organization perceive the company brand and of once more clarifying the brand guidelines. The updated brand guideline collection could serve in unifying the touchpoints. It will provide a framework for unifying the visual elements of touchpoints and provide instructions for the correct use of the brand elements. Also, updated instructions for the use of the brand will be provided. According to interviewees A and E, there are no specific instructions for the use of the brand elements in, e.g., e-mail messages sent out by the company, which sometimes results in incoherencies in the communications and marketing materials.

Individualized, personalized content

In general, interviewees working with content creation state that, to some extent, content personalization and individualization is done, mostly by adding the names of the recipients to email messages or by adding a content block with the information of a local salesperson according to the location of the recipient. However, according to interviewee A, the full potential of personalization has not been utilized but there’s a belief that the new marketing automation tool will help:

“In my opinion, we could do it better. We handle our customers as quite a large group. I believe that [the new tool] will help us to think our activities more through personalization.”

Also, the content of the customer instructions website and the content of the customer service chatbot on the website is personalized. While the page content doesn't change according to the attributes of the visitor, there is always a certain reason for the visit and the profiles of the potential visitors are carefully considered, as A describes:

"Even though the content there is general, I have to think more about what kind of a person comes here – is it a person from a smaller company or from a large enterprise, and how to express the matter:"

Interviewee D agrees with A about the plans to widely utilize the personalization capabilities of the new marketing automation tool and describes a planned newsletter renewal project. At the moment, the business unit is sending out several newsletters to several separate newsletter subscriber lists from a number of email marketing tools. After the update, all of the newsletters would be brought together into the marketing automation tool. Eventually, only one newsletter would be sent out by combining the content of the previously separate newsletters. Each subscriber would be sent a unique version of the newsletter with content personalized according to the recipient information and by the themes they are interested in.

Context sensitivity of touchpoints

In line with the earlier discussed customer journey design mindset, content is created accordingly with the state of the customer. The customer communications team is strongly responsible for regarding the customer lifetime and creating communications that support the steps an individual takes as a customer, as describes interviewee F:

"We walk side by side with the customer – for instance, before deploying a device they receive many messages about where to pick it up, what to do with it. And after the deployment, we can share information about what else can be done with the device. Or we can try to upsell and cross-sell. And at some point of the customer

lifetime, they might indicate that they are at the border of exiting – what to do then? On top of upselling, we can do non-commercial things: we can evoke joy or in another way remind them that they are important to us.”

Even though there is a will to support the customers at all of the steps they take with the company, interviewee E tells that there is still a lot to do with truly bringing all the communications activities involved in customer interaction together into one content journey. (Sitaatti poistettu)

Connectivity of touchpoints

As was noticed from the conversations, the connectivity of touchpoints aspect is a wide topic. It regards, e.g., combining the multi-channel customer data and utilizing it, ensuring the unity of customer experience when moving from one channel to another, and the seamlessness of customer experience while moving between channels (Homburg et al. 2015).

In the online customer experience context, a challenge in connectivity of touchpoints comes from the website structure. The online ecosystem consists of publishing systems that are separate from each other. Although there are strong linkages between the ecosystems, the entities have separate URL addresses.

According to interviewee A, the online ecosystem has been built over time and as a result, navigating between the platforms is sometimes hard from the customer point of view: when navigating in the actual website, the customer is sometimes carried to the content hub, and the customer may get lost there. In addition, the entities do not look exactly alike. There have been conversations about bringing the online platforms together, but so far the personnel responsible for online content face some issues with the separation, as A describes:

“I think we have to bring the platforms together at some point, not the least for the sake of search engine visibility. We publish a lot of articles about the products of the web shop and as someone searches online with the name of the product they may

end up in the content hub instead of the web shop. If they don't find a way back to the web site, we may lose a customer and the money. - - Having more than one location also complicates analytics. - - Also, our placement in the search results could get better if everything was under one URL."

Interviewee D believes it is unlikely that the online entities would be brought under one address, or that there would be another solution for unifying the platforms and integrating them with the marketing automation tool. However, that wouldn't necessarily be a problem:

"I don't believe that the marketing automation tool development is seen as such a guiding power that other system investments would be made for supporting the customer journey design mindset. After all, the [publishing system] we are using right now is custom-made for us. But if it doesn't integrate to our marketing automation tool, there's the possibility of using a separate personalization tool there in the middle."

Interviewee F was asked about the unity of touchpoints in the email communications context. The messages are mostly created on unified message templates. Templates are the frameworks for emails: they contain the logo and the layout of the messages as well as fonts and colors that are used to support the company brand. However, messages of customer service regarding order confirmations, delivery confirmations, contract termination notices and other customer service communications have thus far not been built on unified message templates. Interviewee F tells the customer communications team has been going through these messages with the customer service team to unify the templates.

5.7 Cross-functional approach

According to previous research on the topics, apart from content creation capabilities, having a cross-functional approach is important in both multi-channel customer experience management and successful marketing automation post-implementation. In the framework of the present study, the cross-functional approach consists of sales, marketing, customer communication and business unit alignment as well as alignment between marketing and IT.

Sales, marketing, customer communication and product management alignment

According to interviewee A, there are many teams, product lines and business units and all of them have their own goals and ways of working. The wide product range of the firm could be utilized in building cross-functional marketing automation journeys. However, the full utilization would require taking a cross-functional approach, which, at the moment, is not always considered:

"For some services, we could build something large. It [in marketing automation] could be used to utilize and combine different products and bring together all the communications: the web shop side, customer communications, etc. And we should do it together. Right now, we do a lot of things separately."

Another aspect of cross-functional cooperation is the separation of the marketing and communication teams within the company organization. Interviewee B agrees by explaining that the communications team, and marketing and customer communications are all separate functions. Sharing information between the teams has proved to be troublesome, as the number of employees working in the teams combined is large. However, states B, the communication between the communications teams has been ever developing and is about to get more streamlined, as the teams will start using the earlier mentioned joint content calendar.

Regarding taking a cross-functional approach to driving marketing automation, interviewee C describes the composition of the marketing automation steering group as very cross-functional: customer communications, customer experience development, product management, sales, online team, marketing, and business development are all involved. However, the group has gathered a few times, during which cross-functional collaboration or prioritization has not been at the center of discussion.

According to interviewee D, the collaboration between marketing and sales has been clear and their goals are in line: they both work as part of the lead generation process. There is a clear difference to customer communications: the team has its own objectives. Regarding marketing automation, D states that the collaboration between the three teams in a few marketing automation cases in planning has seemed promising. What comes to product managers and business development, the benefits of marketing automation hasn't, according to D, been widely recognized, but some of the product managers are already learning to utilize it.

Marketing and IT alignment

Both interviewees C and D commented on the collaboration between the IT function and the marketing team. According to C, the IT function is a support function as is marketing in the organization. Interviewee D comments on the role of the IT function and states that its role in marketing automation development is very central. IT is responsible for the development of the CRM system and without integration, nothing works:

"The marketing automation tool without linkages to the CRM system is a tremendously expensive email marketing tool. That's where the importance of IT in this comes from."

According to C, the marketing automation development happens independently but in line with the goals of the IT function. The budget and resourcing for marketing automation comes from IT: the function acquires the licenses and is responsible for technical implementation of the development steps, which serves as a base for further marketing automation development by the other involved teams.

Interviewee C states that the IT function is under financial pressure and has to make prioritization choices between demanded system development projects and acquisitions, and the team has to say 'no' more than they can say 'yes' to proposals. However, the members of the IT organization are, according to C, very forward-oriented and understand the potential of marketing automation, but the resourcing situation of the team is hard. Once again, C emphasizes the need for calculating the benefits of conducting marketing automation to guide the IT function into the direction of supporting marketing automation development.

On the other hand, the extension of the implemented marketing automation tool in the B2B business unit would reduce the total number of used systems. As a result, the overall costs of the IT department could diminish, states C:

"The more the company makes money, the more they [IT] can use, and if we manage to merge our systems as we did by getting rid of the previous marketing automation tool – if we can, say, halve the number of systems, whether that is possible or not – it's a lot in money. And they would have half less systems to run and develop. They, too, want simplicity instead of complexity."

6 DISCUSSION AND CONCLUSIONS

The aim of the paper was to study the use of marketing automation tools as multi-channel marketing platforms as part of digital customer experience management and whether the case company is in a position that allows using a recently implemented marketing automation tool for such. To guide the research, a research question and sub-questions were formed, and in this chapter, the earlier discussed academic information is used to answer the questions. Also, the alignment of the empirical results with the presented academic research is assessed and managerial implications are provided to address how and by whom the results of the study could be used by. At the end of the chapter, the limitations of the results of the study are addressed and further research proposals are given.

6.1 Theoretical contributions

In this chapter, the results are presented by first answering the sub-questions. The sub-questions are, once more, the following:

1. ***Why is successful multi-channel customer experience management important?***

2. ***What is the role of marketing automation in managing digital customer experiences?***

3. ***What are the prerequisites of successful multi-channel customer experience management and marketing-automation post-implementation?***

As a result, the discussion and conclusions chapter answers the main research question:

What are the prerequisites for using a marketing automation platform for multi-channel, digital customer experience management?

6.1.1 The importance of multi-channel customer experience management

Multi-channel customer experience management can be approached from many angles. In general, multi-channel customer experience management is beneficial (e.g., Lemon and Verhoef 2016; Rawson et al. 2013; Payne and Frow 2004). One approach to customer experience management is viewing customer experiences as customer journeys, which can be used for developing cross-functional collaboration (e.g., Rawson et al. 2013). The benefits of cross-functional integration in an organization have been recognized by various scholars who suggest that the unalignment of the goals of marketing and sales teams results in inefficient lead processing (e.g., Järvinen and Taiminen 2016, Marcus 2002, Hasselwander 2006). On the other hand, successful cross-functional integration improves the efficiency of lead processing.

Another approach to multi-channel customer experiences is multi-channel integration and cross-channel coordination of communications activities. Taking a multi-channel approach to customer interaction is beneficial, because as a result, the conversion rates in touchpoints and customer loyalty may be higher, and customers may be more active in word-of-mouth (Court et al. 2009; Edelman 2010; Homburg, Jozić, and Kuehnl 2015). It can also increase customer lifetime value (Shop.org and Boston Consulting Group 2001). According to Payne and Frow (2004), the aim of an aligned experience across channels is to mitigate confusion the customer may have of the firm, which may risk business relationships.

6.1.2 The role of marketing automation in managing digital customer experiences

According to earlier research in the field of marketing automation, marketing automation is linked to customer experiences. It can be used to improving the relevancy and timeliness of content delivery, tracking the movements of customers, and gaining information that can be used in decision making (e.g., Ginty et al. 2012). It can be used for building and maintaining customer relationships (Del Rowe 2016), personalizing and customizing the elements of the marketing mix (Heimbach et al. 2015; Järvinen and Tuominen 2016), and, as mentioned, as a lead management technology (e.g., Ginty et al. 2012). Other use cases are campaign management and analysis, building customer views, marketing activity planning and targeting activities successfully (Ventureharbour 2019), all of which are related to the customer experience. The multi-channel marketing hubs, such as the one chosen by the case company of the study, are used to orchestrate the whole digital customer experience: all of the digital communications across channels (Gartner 2019).

In the case company, marketing automation has been used for creating automated lead generation journeys around specific products. Now, the new tool is used for sending out emails and SMS messages, distributing and collecting information from lead forms on social media channels, creating landing pages, analyzing data, building automated communications journeys, and enabling data transform automation between the platform and the CRM system of the company.

In the interview material, marketing automation was found to be potentially useful – and, if the plan is to conduct multidimensional customer experience management with it, also critical – for combining customer data from all of the interaction touchpoints. According to interviewee D, as a result, the case company could understand its touchpoints and their relations to the performance of the company. Under implementation is the dashboard for analyzing and visualizing data from different channels, and the DMP is discussed. With the DMP, identified and unidentified data could be combined and used, e.g., in creating new customer segments and improving targeting, which would potentially have a large impact on the quality of the customer experience. After the implementation of all the applications offered by the marketing automation provider, a complete 360 view of the customer experience could be built and managed.

The findings are in line with the earlier marketing automation research: the use cases for marketing automation are many, and especially the idea of using marketing automation as a multi-channel marketing hub in a similar way as described by Gartner (2019) was recognized by the interviewees.

6.1.3 The prerequisites for using a marketing automation platform for multi-channel, digital customer experience management

The aim of this study was to create understanding of multi-channel digital customer experience management with the use of marketing automation technology. The topic was viewed from three points of view: customer experience management, marketing automation, and technology implementation. From earlier conducted academic research and the most significant managerial publications, a theoretical framework was drawn to guide the single case study where seven members of the case organization were interviewed. Combining the three topics into one framework was a new approach to understanding the use of marketing automation in real organizations.

The prerequisites for digital multi-channel customer experience management with the use of a marketing automation platform are included in the framework. The elements of the framework were drawn from academic research and significant managerial publications by Goodhue and Thompson (1995), Iacovou et al. (1995), Ganesh (2004), Payne and Frow (2004), Damanpour and Schneider (2006), Neslin et al. (2006), Madaleno et al. (2007), Biegel (2009), Keens and Barker (2009), Brynjolfsson et al. (2013), Rawson et al. (2013), Edelman and Singer (2015), Homburg et al. (2015), Verhoef et al. (2015), Alzaad et al. (2016), and Järvinen and Taiminen (2016).

During the interviews, the topics were found to be very much interrelated and sometimes it was not possible to get answers to the interview questions about customer experience management without the interviewees also including marketing automation and aspects related to its implementation in their answers. Thus, viewing the three topics together turned out to be a useful approach and the interview material was interesting to analyze.

Most of the prerequisites for digital multi-channel customer experience management with marketing automation in the case company are fulfilled. The ones that are not fulfilled yet have mostly been recognized by the members of the case organization and activities to fulfill those prerequisites are already planned or on an idea level. New aspects not addressed in the academic literature presented in the earlier parts of this paper arose. For the prerequisites not fulfilled by the case company yet, managerial implications are given.

Touchpoint journey orientation

The employees interviewed for the study strongly represent the cultural mindset of touchpoint journey orientation. None of them believe that the best customer value is created by only considering single touchpoints. However, many of the interviewees stated that, because of the organizational structure of a large corporation, the journey orientation is not necessarily put into practice, and the official organizational structure is not built around the mindset.

The interviewees also represented different views on what the journey orientation exactly means: some of them viewed customer journey management as customer lifetime management and some as purchasing journeys built around one product or theme. Some believed that holding the customer in the center of the organization and decision-making could be very beneficial, and the marketing automation tool could serve as a framework for a new view on the customer relationship. These thoughts support the assumptions that were made when composing the framework for the study drawn from earlier academic research.

Experiential response orientation

Experiential response orientation (Homburg et al. 2015) was not widely discussed by the employee during the interviews. Interviewee F addressed the thoughts of evoking emotions among customers and stated that, sometimes, customers are sent messages with the aim of creating delight or feelings of familiarity. However, F also stated that there is more to do be done. While the experiential response orientation was partially represented by the interview data, the results did not support considering it part of digital customer experience management.

Touchpoint journey design

The company has experience of shortcomings in implementing the customer journey design and adopting it as a general guideline for marketing automation implementation. However, the shortcomings have been recognized, and there is a strong will of not making the same mistakes again among the interviewees. Building customer journeys has been written into the plans of the wide website renewal project, which represents customer journey design capabilities.

A problem with implementing the touchpoint journey mindset could prove to be the business of employees: journey thinking is easily put aside, if the personnel have full hands with other, more critical tasks. Moreover, while the website structure doesn’t entirely support building digital customer journeys, its renewal is also included in the website renewal plans. In general, as the organization is large, organizational siloes are sometimes in the way of designing holistic customer journeys. All in all, according to the employees, the customer journey design capabilities by Homburg et al. (2015) are present in the company but there are some potential problems that could keep the company from exceling at their implementation.

Touchpoint journey monitoring and prioritization

In the online ecosystem of the case company, data is gathered and analyzed from a variety of touchpoints and by several tools. For instance, the company assesses its online customer experience by measuring the CES score, which is also included in the company’s balanced score card metrics.

Each data source has its own analysis system. As a result, the company cannot utilize all of its data and is sometimes forced to count on assumptions instead of making decisions based on validated data analysis. Fully combining data – identified and unidentified – from all of the touchpoints would require the deployment of the DMP and building a data model, which would also notably help in creating a visualization of the touchpoints and of the conducted analyses. However, deploying the DMP would be a vast investment in terms of capital and human resources, and, according to interviewee D, would require harnessing all of the applications that the marketing automation platform provider offers for the platform.

All in all, the company somewhat represents touchpoint journey monitoring and prioritization capabilities (Homburg et al. 2015). Data is gathered, analyzed, and used for decision making. The ability of the case company, however, to build a 360 view of the interactions of its customers in each touchpoint and to utilize that information in mapping true customer journeys is at an early, yet rapidly progressing, phase.

The visibility of brand elements in touchpoints

According to the interviewed employees, the brand of the B2B business unit of the case company is not entirely unified. There are certain elements that are highly recognized and used in all of the communications and marketing materials produced by the business unit, but as the employees send out messages from a variety of messaging tools and distribute them in a variety of channels, there is no ultimate decision-maker to say the final word about how the messages should look like compared to other messages. Out of the brand elements suggested by Homburg et al. (2015), the core elements – mostly, the company logo – are visible in all of the touchpoints, but it doesn’t seem to guide the work of the employees enough for them to create completely unified brand visibility. Furthermore, some of the campaigns have a differing theme that represents the company brand even less.

Individualized, personalized content

To some extent, the business unit of the case company is at a nascent state with content personalization and individualization, which is also recognized by the interviewed employees. In some contexts, personalization is done and content is created with regard to, e.g., the likely profile of a potential website visitor. However, in many cases, personalization is done by adding the name of the contact to materials or by personalizing the company contact information according to the location of the recipient.

While the company could benefit from wider utilization of content personalization, as suggested by, e.g., Peppers et al. (1999) and Payne and Frow (2004), it has recognized the potential of its marketing automation platform in it and taking steps toward truly individualized content creation. The newsletter individualization project is a concrete sign of future capabilities of content personalization and individualization.

Context sensitivity of touchpoints

The context sensitivity of touchpoints (Homburg et al. 2015) was not strongly represented in the interview material, potentially because not many interviewees were directly asked about it. However, interviewee F, the representative of the customer communications team, clearly represents the idea of walking along with the customer throughout the customer lifetime as by, e.g., Lemon and Verhoef (2016) divided into the prepurchase, purchase, and post-purchase stages. To gain a real image of the level of context sensitivity of touchpoints in other teams and on an organizational level, more research should be conducted and more interview material should be collected.

The writer of this thesis also suggests that another reason for not being able to collect a lot of interview material about context sensitivity is that it could be a later stage of journey personalization. Context sensitivity means considering the needs and hopes each individual has for the touchpoints, and, for instance, understanding that customers in different customer lifetime stages want to come across different messages in the touchpoints (Homburg et al. 2015). This, considering the stage in which the case company is at with content personalization, seems like a complex and far developed idea.

Connectivity of touchpoints

In the online ecosystem of the case company, the most notable aspect hindering the connectivity of touchpoints, the uninterruptedness of the customer experience when moving from one channel to another (Homburg et al. 2015) is the use of separate publishing systems. Moreover, as the other touchpoints such as email and social media messages are managed in many tools and by a large group of people, and as the brand of the B2B business unit of the company is rather colorful because of the because of the wide product and service offering, the level of touchpoint connectivity in the case company seems relatively low.

Cross-functional approach in the case company

As delivering positive customer experiences in the interaction environments of today requires integration of organizational functions (e.g., Edelman and Singer 2015, and Rawson et al. 2013), the cross-functional alignment in the case organization was discussed. The teams in the case organization work partially cross-functionally. In general, the interviewees mentioned siloed operations multiple times and also believe that it often limits cross-functional planning of customer journeys. However, the goals of marketing and sales are aligned, and they are both included in the lead generation process, which is an example of cross-functional alignment in the case organization.

Also, the collaboration between the marketing and IT functions seems to be somewhat functioning. The need for marketing and IT alignment in technology implementation was recognized by, e.g., Ganesh (2004), and Keens and Barker (2009). As both IT and marketing in the case organization are support functions, they have similar positions and they operate by the same general goals: their role is to take part in the general performance of the company. Regarding marketing automation, the goals also seem to align: the marketing team aims at getting rid of unnecessary IT tools, and so does the IT function.

Biegel (2009) advised organizations to also ensure collaboration with representatives of the external marketing automation technology provider, and with an external consultant partner. There is an external marketing automation consultant, but thus far, the partner has mostly been included in the technical implementation of marketing automation and not served as a strategic partner. Current relationship of the case company to representatives of the marketing automation platform provider remains unknown.

User attitudes, task-to-technology fit and marketing automation use skills

The attitude toward marketing automation in the case company is positive. Moreover, the selected marketing automation platform has, in general, been accepted by its users, and there are high expectations about its performance as part of the CRM ecosystem of the company. It is described as a powerful platform with the capacity needed for multi-channel communications management.

The interviewed employees had differing use skill levels, which were suggested to be a prerequisite for successful technology implementation by Iacovou et al. (1995), but it was also recognized that not everyone is required to have a high practical skill level. In the case company, the user skills seem to be on a sufficient level. Trainings have been organized and the user skills have improved as the personnel has used the tool for real-life marketing automation cases. However, there are concerns regarding the true utilization of the platform in integration with the CRM system, but this isn’t directly about the platform or its attributes but more about how the company manages to integrate it to other systems. Thus, the user attitudes, task-to-technology fit, and marketing automation use skills in the company seem to be on a good level. The image of a good task-to-technology fit is supported by a research about multi-channel marketing hubs by Gartner (2019). In the research, the fit of the chosen marketing automation tool to serving as a multi-channel marketing management tool is characterized by its wide set of applications and artificial intelligence capabilities that are required for multi-channel marketing management and orchestrating marketing journeys. The tool also earns praise for its extensibility: the ecosystem enables integrations with a set of partner applications. However, its cross-product customer view function is still in development, and its lack of tools for profound, multi-dimensional analysis and reporting has evoked negative feedback among user companies, which is in line with what interviewee D commented on the reporting capabilities of the platform.

A strong marketing function

Previously, the marketing function of the organization has not had a strong role in marketing automation development, even though members of the marketing team have taken part in content creation for the marketing automation cases. Now, members of the marketing organization are included in the unofficial development group and the steering group for marketing automation decision making. Thus, as Biegel (2009) addressed in the managerial article about getting organized for marketing automation, the marketing function has a relatively strong role in marketing automation development. However, the marketing function does not have official ownership of the marketing automation platform.

Processes

A process-driven orientation toward marketing automation was suggested by Biegel (2009). In the case company, there is no process for marketing automation and thus, marketing automation implementation and development are not process-driven. The interviewees, however, recognize that marketing automation is connected to a number of other organizational processes, such as the lead and delivery processes. However, the idea of including marketing automation in the processes in some way is there: e.g., interviewee C stated that the company should organize a walkthrough of processes regarding marketing automation.

Financial readiness

Both Iacovou et al. (1995) and Biegel (2009) discussed financial readiness as requirements for successful technology or marketing automation implementation. As discussed by the interviewees, the financial readiness for marketing automation has two sides: the direct licensing costs, and the indirect human resourcing costs. Among interviewees, there is a general consensus that the current direct costs are recognized and catered for by the top management of the firm. Larger investments, e.g., acquiring the DMP and building the data model, can be discussed, and while the company is making other large investments that could affect its financial readiness for marketing automation investments, the interviewees are quite confident that funding will be found – if the expected return of investment is carefully calculated and presented to the decision makers.

However, the financial readiness for indirect costs remains a question mark. The technical marketing automation developer, interviewee D, believes the amount of employees available for marketing automation is sufficient, whereas the marketing communications leader, interviewee C, believes that scaling up marketing automation activities will shortly run to a dead end with the current amount of human resources. In the course of the research process, an image has been formed of the abilities of the case company to successfully exploit the full potential of marketing automation. Based on that image, the assumption is made that there currently are not enough employees with marketing automation understanding and user skills to drive the implementation of the tool to the direction that it could be used as a multichannel digital customer experience management platform.

Top management support

Top management support has been recognized as a crucial force in successful implementation of technologies and researched by, e.g., Alzaad et al. (2016) and Damanpour and Schneider (2006). According to the findings from the interviews, the top management see the potential of marketing automation and support marketing automation development, given it is conducted in a manner where creating customer value has a central role – that is, if it is used for multi-channel customer experience management. The interviewees who do not work on the top management level also have experience of the generally positive mindset of top management toward marketing automation.

6.1.4 Findings outside the framework

Outside the academic research discussed in the earlier chapters of the paper, many additional findings came up. These are interesting findings and are advised to be assessed, not only by the case company, but also by others interested in developing the digital customer experience with the use of marketing automation technology.

Some of the interviewees discussed concerns about the sufficiency of available user licenses and the capacity of the marketing automation tool in sending out email and SMS messages. As, to the best knowledge of the writer of this thesis, most of the marketing automation platforms of today are cloud-based and their earning logic is subscription-based, this aspect is added to the list of prerequisites: any company willing to automate its marketing should make sure that the employees are given enough capacity to conduct the cases.

As was discussed in the results section, marketing automation is not a project that can be applied to an organization. The case company has had the experience of trying to implement marketing automation by making it a large project and by expecting the company to adapt to the vast changes executing the project would require. In the context of the case company it is clear that the implementation process should be iterative, and that the volume of marketing automation cases should not drive it. Instead, it should be guided by customer value: experiments conducted with smaller populations, documentation of work, learning, and calculating the financial results and effects on customer experience measurements.

One of the prerequisites for managing digital multi-channel customer experiences with the use of marketing automation turned out to be the integrity of data and abilities to combine and analyze data from many touchpoints. Creating such abilities can be vast projects monetarily and in terms of human resources and required organizational changes. Such projects alone are multidimensional and would require academic research of their own.

The integrity of data is somewhat related to another finding: the abilities of a company to target its communications to the right recipients and to ensure that, if an extensive amount of messages through many channels are distributed, the recipients do not consider it spam or in other ways disturbing. These abilities come down to the quality of data and to the abilities of a company to analyze its recipient base and the effects of its communications on customer satisfaction and churn.

6.2 Managerial implications

The framework of this study was tested in assessing the prerequisites of the case company for using marketing automation in digital multi-channel customer experience management. As a result, managerial implications be given.

Along with the additional findings from the study that any marketing automation practitioner can benefit from, a set of instructions could be drawn from the results of the study. These instructions are organization-specific and the case company is advised to follow them to successfully progress with the marketing automation implementation.

Adopting a company-wide definition for customer experience management would be beneficial. If the concepts of customer experience, customer journeys, purchasing journeys, customer lifetime management, multi-channel customer experiences and even marketing automation are discussed, their definitions should be so clear to everyone in the organization that it could truly guide the organization on the operational level. When definitions are unclear, full progress cannot happen.

The case company is also advised to organize a large-scale research of the current human resourcing situation and whether more people with marketing automation content creation skills, technical development skills, or general marketing automation best practices understanding is needed. If more know-how is needed, trainings should be organized. Such a research, too, requires careful documentation of the current marketing automation cases and plans for marketing automation.

As suggested by interviewee C, it is highly recommended that the company conducts a walkthrough and draws a blue print of how marketing automation is connected to the processes of the organization to decide whether a separate marketing automation process definition is needed. This also depends on the mindset the organization takes toward marketing automation: it can be seen as a tool that improves the functionality of the other processes, or as a framework for viewing and managing the customer experience throughout the customer lifetime. As a customer experience management framework, it should at least be officially included in the descriptions of other processes.

The official ownership of the marketing automation platform is in another function, and there, too, there is no specific marketing automation responsible. Many of the interviewees raised concerns about not having anyone who would have the eventual decision making power, a clear plan for marketing automation development, and the responsibility to execute that plan. The writer of this thesis highly recommends assigning one person with the responsibility and ownership of the development. As discussed by some of the interviewees, the ownership should be in the marketing function. Biegel (2009) recommends the person should have a strong interest for marketing automation implementation and be responsible for creating teams that in line with the marketing strategy of the organization and guided with a well-defined budget and key performance indicators. Biegel (2009) recommends this person be the CMO of the organization.

As was recognized by the interviewed employees, the marketing automation tool use skills seem to be on a sufficient level in the organization. However, concerns were addressed that there may not be enough people with the needed user skills, which could already soon decelerate the speed of marketing automation development in the case company. Thus, a suggestion is made that the company conducts a mapping of who is currently using working with marketing automation and how much, and as, likely, more experts will be needed, when they should be acquired.

The company is also advised to improve cross-functional collaboration and to widen the role of its external marketing automation partner, as suggested by Biegel (2009).

The technical implementation help is definitely needed, but if the company is willing to move toward using marketing automation as a multi-channel digital customer experience management platform, creating true collaboration between the organizational functions is needed. Strategic advice from an external partner would be welcome, as the direction of the case company for marketing automation development still remains to some extent unclear.

The writer of this thesis suggests that the online entities are brought together and would be found under one URL, to improve touchpoint connectivity. Bringing the online entities under one roof would definitely ease the management of the digital customer experience, its analysis and the search engine results the pages are getting at the moment. However, as mentioned by interviewee D, there likely is no will in the organization to do so, and in that case it is suggested that the company carefully makes sure that digital customer experience management is enabled by integrating a functioning content personalization tool to the ecosystem.

There is an ongoing project for building customer journeys and renewing the website structure. Conducting such tasks in such a large corporation in a way that enables customer journey design can be considered an enormous challenge for any employee. The company should ensure that there is a person who is responsible for the tasks and who is granted the resources to implement them. More tactical activities easily overthrow viewing the big picture if time and resources are scarce.

To improve brand integrity in different touchpoints, it is suggested that the company creates a brand book with very clear instructions for the specific use of content producers and for anyone who is responsible for distributing content in the B2B channels. As the company is at the moment conducting a brand survey as part of consistent brand evaluation and development, the writer of this thesis suggests that the brand book is published as a continuum to that survey. The digital customer experience is likely much more coherent and, thus, as suggested by, e.g., Ganesh (2004), also beneficial to the company, if it is guided by the brand.

As the ability of the case company to utilize the full potential of its data in creating customer journeys is at an early stage, the company should not yet take concrete steps toward implementing the DMP. The implementation would be a massive investment to make, and the company still has a lot of work to do with creating a model for following what's happening in all of its current touchpoints. However, as the members of the organization clearly support the ideas of Homburg et al. (2015) in regards of touchpoint journey orientation and as the ability to design and implement those touchpoint journeys is already written in the plans of the organization, there do not seem to be barriers for eventually creating a true 360 view of all of the company's online interactions with all of its customers. Consequently, the company seems to be truly taking steps toward digital multi-channel customer experience management with the use of marketing automation technology.

6.3 Limitations and future research

All in all, the thesis only begins to research the concept of marketing automation as a customer experience management tool. There are many elements in the framework, the role of all of which could be researched more profoundly and in detail in the context of digital customer experience management. Customer experience management alone is an important but relatively little researched concept let alone marketing automation and multi-channel marketing hubs.

From the customer experience management conceptualization of Homburg et al. (2015), most of the elements were seen as a solid base for the research of the study and thus, picked to the theoretical framework of the research. Two elements were left outside: the cultural mindset of alliance orientation, as it takes into consideration the external relationships of the firm, as the aim of the case study was to create an image of the internal, current state of the company. For the scope of the study, also the touchpoint adaptation capability was left out. These aspects would have been interesting to add to assess, but are left for further research. Left out of the scope of the study were also the touchpoints that are not in control of the company.

The other phases of technology implementation were also left outside the scope of this study. It would be interesting to learn whether something could have been done differently before the initial implementation of the marketing automation tool in the case company and how it would have affected the current abilities of the company to develop marketing automation.

From the interviews, it was recognized that marketing automation skills aren't only about the practical use skills but also about understanding what it can be used for. More than the use skills, it would be fascinating to address the level of general understanding in a company of marketing automation, its potential and real-life use cases, and the effect of this understanding on successful marketing automation post-implementation.

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Appendix 1: Interview questions

General questions

1) Please describe your role and tasks

Multi-channel customer experience management

1) How do you perceive the relationship of the company to its customer? How should the company perceive its customer relationships?
2) In communication to customers, does the company aim at evoking feelings, sensations, or experiences? How?
3) How do you make sure that the content the customer comes across when interacting with the company is relevant?
4) How is customer lifetime thinking taken into consideration in content management?
5) Customers likely interact with the company in multiple touchpoints. How are these touchpoints examined, analyzed and managed?
6) How are the touchpoints measured?
7) Is seamlessness of customer experience in different channels assessed? If, how is it managed?
8) How is seamlessness of customer experience ensured when the customer moves from one communication platform to another, e.g., between one website platform to another?
9) How do processes steer customer experience management?
10) How do different functions of the organization work together to manage customer experience?
11) What kind of a role does the management of the organization have in supporting customer experience management?
12) Please describe online customer buying journeys. How are they defined, analyzed and optimized?
13) From which channels is customer behavior data collected?
14) How can this data be combined and utilized at the moment? What about after broader implementation of the marketing automation tool?

15) At the company, operations are to some extent driven by an *omni-channel* mindset. Please describe it.

Self-service portal

1) Please describe the self-service portal of the company.
2) How is the self-service portal related to customer experience?
3) In what ways, if any, does online customer buying journey thinking show in the self-service portal?
4) How are transaction and buying journeys defined and developed in the self-service portal?
5) In your opinion, how is the self-service portal linked to marketing automation now and in the future?

Brand

1) What is the brand of the company like and how is it visible in customer communication?
2) How does the visual brand and other brand elements show in content?

Marketing automation

1) Have you used the marketing automation tool?
2) Are you or have you been involved in marketing automation development?
3) To what direction do you think the company is going with marketing automation?
4) What can be achieved with marketing automation on the company level and in general?
5) What is your role in marketing automation development?
6) How well do you feel the marketing automation tool fits its purpose?
7) In what ways do marketing, sales, customer communications, business units and business development function work together to develop marketing automation?
8) What is the role of company IT in marketing automation management?
9) If there are any, what are the challenges of marketing automation development?

10) How is marketing automation development led?
11) What is the view of upper management to marketing automation?
12) Please describe the resources required for marketing automation development. To what extent are these resources provided by the upper management?
13) Which processes are related to marketing automation?
14) Are the related processes well defined and do they support marketing automation development?
15) To what extent does the marketing function have the power to affect marketing automation development?