

Marketing Automation

The usage of automated marketing systems within international communication

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Abstract

Marketing Automation - The usage of automated marketing systems within international communication

The increasing digitization is affecting more and more companies. This includes the arising of new opportunities and challenges. As a result of this development more companies start to use software tools and include digitization within their strategies. Concerning the field of marketing, marketing automation is one of the buzzwords within the recent years. Several companies are using this instrument within their marketing activities and the usage is increasing. This thesis aims to deliver an overview about this instrument. The thesis will further show how different companies use marketing automation within their marketing activities and especially within communication. Further the thesis is going to deal with the components that are necessary to run a marketing automation system effectively. Within this aspect, the components of data collection, data analysis, segmentation and the potentially usage of personas, the creation of content, the selection of channels and the evaluation of the overall system could be identified. Finally, the thesis is going to discuss the different usages of marketing automation to derive implications for companies that aim to introduce a marketing automation system.

Kurzreferat

Marketing Automation – Die Nutzung automatisierter Marketing-Systeme in der internationalen Kommunikation

Die Entwicklung der Digitalisierung während der letzten Jahre stellt die Unternehmen vor neue Herausforderungen. Es entwickeln sich ständig neue Trends und Möglichkeiten, auf die Unternehmen reagieren können und teilweise müssen. Besonders im Bereich des Marketings gibt es hierbei neue Dynamiken. Einer der neuen Trends ist in diesem Bereich die Marketing Automation, die von immer mehr Unternehmen eingesetzt wird. Im Rahmen dieser Masterarbeit wird der Trend näher beleuchtet. Es geht darum aufzuzeigen, wie Marketing Automation aktuell in der internationalen Kommunikation genutzt und eingesetzt wird. Des Weiteren beschäftigt sich diese Masterarbeit mit den Komponenten, die für eine erfolgreiche Nutzung von Marketing Automation notwendig sind, beginnend bei der Sammlung und Nutzung von Kundendaten. Anhand von Beispielen wird der Einsatz evaluiert, um anschließend Schlussfolgerungen für Unternehmen, die Marketing Automation nutzen wollen, zu ziehen.

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List of Abbreviations and Symbols

AI	Artificial Intelligence
CMS	Content Management System
CRM	Customer Relationship Management
DSGVO	Datenschutz Grundverordnung
EMA	Enterprise Marketing Automation
ERP	Enterprise Resource Planning
EU	European Union
FAQ	Frequently asked questions
FHV	FH Vorarlberg
KPIs	Key Performance Indicators
SEA	Search Engine Advertising
SEO	Search Engine Optimization
UK	United Kingdom
US	United States of America

1. Digitization as a driver for changes within marketing communication

The increasing digitization is one of the major challenges for companies and marketing within the recent years^{1 2}. This development is not finished yet. Consequently, the digitization or digital transformation will continue to be a challenge in the upcoming years as well^{3 4}. The digitization has produced new opportunities and tasks as well as new problems and difficulties for companies^{5 6}. Those affect most or even all departments of a company⁷. These new challenges and opportunities include for example innovations within production processes⁸. In addition, the development of digitization has reached a high speed. Consequently, new trends, innovations, or communication channels evolve constantly⁹. One of the departments that is highly affected by this development is the marketing department¹⁰. This accounts for all fields within marketing including communication activities¹¹.

The newly arising opportunities for communication in the digital environment led further to changes of customers' expectations¹². The changing expectations affect advertisement, further communication activities, and the interaction with brands¹³. As a result, companies are forced to adapt their communication and marketing activities to meet the new expectations¹⁴. This can include minor adaptations as well as the potential need to rework and restructure the marketing activities completely. Therefore, the change requires a strategic approach¹⁵.

One of the reasons for the changing expectations is the increased accessibility of information¹⁶. Customers in the digital environment have access to a high number of different information that they do not have in a purely offline environment¹⁷. This information are further accessible at anytime and anywhere¹⁸. This has again increased through the

¹ (Yamamoto, & Lloyd, 2019, p. 127)

² (Naščáková et al., 2019, p.202)

³ (Orji, 2019, p. 47)

⁴ (Lozic, 2019, p. 166)

⁵ (Orji, 2019, p. 48)

⁶ (Härting et al., 2017, p. 1647)

⁷ (Lozic, 2019, p. 162)

⁸ (Lozic, 2019, p. 159)

⁹ (Härting et al., 2017, p. 1652)

¹⁰ (Naščáková et al., 2019, p.202)

¹¹ (Tankosic & Trifunovic, 2015, p. 174)

¹² (Kruse Brandão & Wolfram, 2018, p.5)

¹³ (Tankosic & Trifunovic, 2015, p. 174)

¹⁴ (Naščáková et al., 2019, p.201 f.)

¹⁵ (Petru, et al., 2020, p. 201)

¹⁶ (Petru, et al., 2020, p. 202)

¹⁷ (Tankosic & Trifunovic, 2015, p. 174)

¹⁸ (Villani, 2018, p.3 f.)

development of mobile devices¹⁹. Consequently, the accessibility of more information includes that customers' have information about competitors and their products as well²⁰. This can simplify the change of brands and possibly decrease customer loyalty²¹. As a result, customers can do a lot of research before they decide to purchase²². This increased comparability can be both an opportunity or a risk for a company.

In addition, customers increasingly demand support and a personalized interaction anywhere, anytime and in any channel, they want²³. As a result, the trend of personalizing messages and advertisings is one of the most important current trends in communication²⁴.

The communication and marketing activities and content are potentially not the only aspects that need to be adapted to the new digital channels and the new preconditions. In addition, companies might be forced to rethink and eventually rebuild their overall marketing processes or their approach of marketing management. According to Yamamoto and Lloyd, speed, and the ability to adapt to the trends is one of the most important aspects in Marketing nowadays²⁵. Consequently, the changes are further a question of time and pace as those new trends arise constantly.

Another influencing factor for the changing environment are new inventions and innovations. Those are mainly technological driven. Considering marketing and especially digital marketing and communication, there are several innovations that gain influence. Consequently, these innovations are used increasingly. This can be new and additional channels or platforms for communicating or the possibility of selling online. Next, there are new tools that can be used for communicating within the digital channels²⁶. Other innovations influence the tasks of data collection or the analysis of data. This results further in the need to automate several processes. The automation is also possible through the technological and digital innovations.

As the number of trends within marketing is high, some of the most relevant trends that affect communication activities of have an influence on marketing automation are shortly described in the following figure. A detailed definition of the most important parts is then following in the second chapter of the thesis.

¹⁹ (Schumacher, 2020, p. 304 f.)

²⁰ (Tankosic & Trifunovic, 2015, p. 177)

²¹ (Villani, 2018, P.5)

²² (Kruse Brandão & Wolfram, 2018, p. 96)

²³ (Villani, 2018, P.7 f.)

²⁴ (Kruse Brandão & Wolfram, 2018, p. 9)

²⁵ (Yamamoto; Lloyd, 2019 p.126)

²⁶ (Lipiäinen, 2014, p. 38)

<p>Experience Marketing (Suwelack, 2020):</p> <p>Creating experience for customers is not a new field. Nevertheless, this part of marketing gained importance in the recent years. Creating an experience throughout the whole customer journey, includes the usage of different tools and the creation of an overall strategy.</p>	<p>Data-driven Marketing (Yamamoto; Lloyd, 2019, p. 131):</p> <p>Data driven marketing is another important trend nowadays as digitization has led to a high amount of data accessible. This data can be used by marketers to adapt their marketing activities.</p>	<p>Marketing Automation (Bagshaw, 2015):</p> <p>Marketing automation is the trend that will be analyzed within the thesis and therefore will be defined in the next part of the thesis in detail. In its core, Marketing Automation refers to the automatization of marketing processes and can affect several marketing activities.</p>
<p>new trends in marketing</p>		
<p>Chatbots (Naščáková et al., 2019, p.202):</p> <p>Chatbots are increasingly used by different companies in the recent years. Bots are a digital tool that are based on artificial intelligence. The bots are trained and can then deliver information to the user and answer questions. They serve the increasing need for instant and relevant information.</p>	<p>Programmatic Advertising (Naščáková et al., 2019, p.203):</p> <p>Programmatic Advertising is a trend that can be ideally connected with marketing automation. Within programmatic advertising, AI is used to analyze the users in order to track them more precisely.</p>	<p>Personalization or Individualization / Customer centricity (Naščáková et al., 2019, p.203) (Villani, 2018, p.8 f. & 67 f.):</p> <p>Individualized content and advertising are becoming increasingly important, and many companies strive to personalize their messages. This is because customers expect brands and companies nowadays to personalize their messages. To deliver individualized communication, companies can collect user data and use this data to adapt their communication. Personalization is not only important within communication. Products that are able to be personalized or that are configurable deliver an unique value to the customers and can be part of a companies' marketing activities as well.</p>
<p>Social Media Marketing (von Rüden et al., 2020, p. 153 f.):</p> <p>Social Media Marketing is another field within digital marketing that evolved within the recent years. The reason for this development is the increasing usage of social media platforms as communication channels and the development of the platforms itself.</p>	<p>Content Marketing (Lammenett, 2021, p. 337 f. & 341):</p> <p>Content Marketing is dealing with the delivery of relevant information for customers that goes beyond advertising. The principle of content marketing exists for several years and has experienced a push in the recent years.</p>	

Figure 1: new trends in the field of marketing²⁷

²⁷ Created by author based on Suwelack, 2020; Yamamoto; Lloyd, 2019, p. 131; Bagshaw, 2015; Naščáková et al., 2019, p.202 & 203; Villani, 2018, p.8 f. & 67 f.; Lammenett, 2021, p. 337 f. & 341; von Rüden et al., 2020, p. 153 f.

The trends mentioned in Figure 1 show that marketing in the digital era is influenced by different aspects. Especially technological inventions that enable companies to automate and increase the speed of their activities have a great influence. Another big impact is the access to big data²⁸. An additional invention that is already playing an important role and will become even more important in the future is artificial intelligence (AI). AI is playing an increasing role within the analysis of data and can further be used for the automation of marketing processes²⁹. Therefore, this new technology can be an influencing factor to a marketing automation system.

Besides the technological innovations, customer centricity is becoming more important within the communication strategies of companies³⁰. Customer centricity is necessary throughout the whole customer journey and is required by marketing automation as well³¹. The recent trend is that companies are increasingly targeting their customers individually within their communication³². This includes that communicated messages and content are personalized for the users³³. The aim is to tailor the content to the interests and needs of the different users. This change is based on the changes in the behavior of the customers as well as their consumption of media and digital channels³⁴. In addition, the developments in demand, including the increased demand for customized products or services, are another influencing factor for the automatization of processes³⁵.

As a result of this ongoing development, an increasing number of companies use marketing automation systems. They use this instrument for example to improve the efficiency and transparency of their marketing processes³⁶. The trend of using marketing automation systems is, so far, mainly spread within the US and the UK. Many companies have implemented such a system in those countries. In contrast, companies in the German-speaking countries are still behind the trend³⁷. Consequently, there is a great potential that marketing automation systems might be implemented increasingly by companies in the German-speaking countries within the next years.

Overall, the ongoing digitization has led to a high number of new technologies and new possibilities for marketing and communication activities. Additionally, as mentioned before there is the potential that will be various new trends and development in the future. Within

²⁸ (Gentsch, 2018, p. 7 f.)

²⁹ (Gentsch, 2018, p. 1 f.)

³⁰ (Petrů et al., 2020, p.201)

³¹ (Körner, 2017, p. 121)

³² (Todor, 2016, p.1)

³³ (Ferretti et al., 2016, p. 157)

³⁴ (Biegel, 2009, p.201)

³⁵ (Todor, 2016, p. 1)

³⁶ (Kupplmayr, 2017, p. 149)

³⁷ (Heinzelbecker, 2017, p. 321)

this thesis, the focus will be on the usage of marketing automation within International Communication. Marketing automation has several touchpoints to some of the mentioned trends and opportunities and is therefore a great opportunity for an analysis. Other trends can be included in marketing automation systems or have an influence on the systems. Those touchpoints and affected marketing trends will be described and defined in chapter four of this thesis.

2. Literature review and research question

Although marketing automation is a rather new trend and tool that companies can use within their marketing activities, there is already a great amount of literature available. The following part of the thesis aims to deliver an overview about the current standings of research concerning marketing automation. This includes literature that defines the instrument as well as literature that deals with the application of marketing automation. The overview should show the development of literature concerning marketing automation since the term has been established. At the same time, this review should deliver an overview of the facts that are known about marketing automation so far. The term marketing automation itself will be defined in detail later within the theoretical framework in chapter four.

2.1 Literature review

The literature that is going to be mentioned in the following paragraphs delivers helpful information to understand the instrument of marketing automation. In addition, the literature is already showing connections to further fields within marketing and show potential usages of marketing automation. Overall, this review aims to deliver an overview about previous research concerning the topic of marketing automation. Consequently, this literature review is helpful to understand the following analysis that is done in chapter five of the thesis.

Patrick Lusey has already dealt with the advantages of marketing automation in 1993. This was at a very early stage of the development of marketing automation. He considered that a software for marketing and also for sales is rather a management system. He further stated that companies that have already implemented automation for marketing and sales at that time were seeing an increase in their profit. He identifies the amount of data and the fractured structure of marketing and sales as the differentiating factor. This could lead to a competitive disadvantage in case that the competition uses automations. Although he refers

the software to be management systems and highlights the benefits for the management that is resulting through automation software, this paper is clearly focusing on marketing automation as a software solution³⁸.

In 2000, Shaun Doyle has investigated the components of a marketing automation system that are necessary within a multi-channel environment. Within this research, the multi-channel environment is further characterized through real-time developments. He identified that marketing automation should not only be focusing on campaign management. In contrary, it is necessary to use marketing automation to support further processes within marketing. He identified the management of customer information, including collection and analysis in real-time as a key component for marketing automation systems as this results in decision making. Besides this key component, Doyle explained which processes can be impacted through the usage of marketing automation. Therefore, this paper adds additional perspectives to marketing automation compared to the previously mentioned paper³⁹.

Together with John Georghiou, Shaun Doyle has further analyzed the changes of processes that are necessary for the implementation of a marketing automation system in 2001. They identified that the fast speed in the development of software and tools results in a major challenge for companies. Consequently, change management is necessary when a marketing automation system is implemented. The result was a framework for this change management that was provided in the paper⁴⁰.

In 2007, Larry Goldman has summarized the knowledge concerning marketing automation that was available thus far. He identified that there are several reasons that are driving companies to use marketing automation. He further mentioned that the integration with customer relationship management is an important aspect when deciding to use marketing automation. In addition, this paper delivers several questions that a company needs to ask itself when deciding whether they should implement a marketing automation system. The paper is therefore very practical and can be helpful in the decision-making process of a company⁴¹.

Keens and Barker have also investigated the implementation of marketing automation systems in 2008. The focus was to show the key success factors for the implementation of the system and further to identify the influences on the outcome. The authors identify the change towards customer centricity and data driven marketing as some of the reasons for the overall development of marketing automation. Further, they state that companies that

³⁸ (Lusey, 1993)

³⁹ (Doyle, 2000)

⁴⁰ (Doyle, & Georghiou, 2001)

⁴¹ (Goldman, 2007)

aim to implement marketing automation need to know and understand their current processes. This awareness is the basis to identify which processes can be automated efficiently. Additionally, they show that the outcome and the influences on the outcome are highly dependent on the specific requirements of the individual company and the use-case⁴².

Bruce Biegel has researched the current standing of marketing automation in 2009. In addition, he gave an outlook on the potential development of marketing automation. He identified the potential and the chances that marketing automation can deliver and stated an increase of the importance. His outlook was further that companies that are successfully using marketing automation have the potential to gain a competitive advantage⁴³. According to the information of the other following sources, the predicted increase in the usage has proven true.

Shane Redding has investigated whether the usage of marketing automation, as an example of technological innovations, can be helpful to connect and align the departments of marketing and sales. Even though these two departments have interdependencies, there is still a distance and a gap between the departments within several companies. Although the author argues that the usage of digital tools like marketing automation can be a positive factor within the alignment of the two departments, she highlights that finding from research are still missing⁴⁴. This fact shows that the field of marketing automation delivers further opportunities for additional research. As this paper has already been published in 2015 there is the chance that this specific topic is already investigated further.

In 2016, Raluca Dania Todor has a paper where marketing automation is defined. She has further distinguished marketing automation systems from Customer Relationship Management (CRM). In addition, some examples for the application of marketing automation were mentioned. According to the paper, the automation of email marketing is one of the most important use-cases within the usage of marketing automation. In addition, the author states that companies that use marketing automation systems have deeper insights into their customers. This includes their needs, behavior, and preferences⁴⁵.

Another definition of marketing automation is delivered by Heimbach, Kostyra and Hinz. They also distinguished marketing automation from CRM and delivered examples for the usage. In addition, they described the current state in the development of marketing automation and the importance of this opportunity for companies. Here, it is important to

⁴² (Keens & Barker, 2009)

⁴³ (Biegel, 2009)

⁴⁴ (Redding, 2015)

⁴⁵ (Todor, 2016)

mention that this paper has been published in 2015. Therefore, especially the current state of marketing automation might be different today⁴⁶.

In 2017, Uwe Hannig is again defining marketing automation. This time, the focus is on the state of marketing automation in the German-speaking countries. Within this context, the author identifies that the usage of marketing automation in the German-speaking countries is far behind the usage in the US or UK. This accounts especially for medium-sized companies⁴⁷. This is an interesting finding as it shows that there is still a great potential of an increase of the usage of marketing automation within medium-sized companies in German-speaking countries. Therefore, this thesis is aiming to draw conclusions concerning the usage of marketing automation that can be helpful for medium-sized companies.

Vormelcher and Hoffmann deliver a framework for companies that aim to implement a marketing automation system in 2017. Their paper defines the aspects that need to be evaluated concerning the decision for a marketing automation system to increase efficiency. The authors further understand marketing automation not only as a digital tool but also as a strategic approach⁴⁸. This is an additional dimension that several authors highlight within their articles and will be discussed within the definition of marketing automation later in the thesis.

Another practical framework is delivered by Edwin Kissel in 2019. Within the master thesis, the author developed a step-to-step guideline for the implementation of a marketing automation system⁴⁹. This guideline can be a helpful first insight for companies that aim to introduce a marketing automation system.

In 2017, Torsten Herrmann investigated how internationalization and inbound marketing can be done using marketing automation. He did the research using the market of books in Latin America as an example. As a result, the goal of the campaign that was the generation of leads, was achieved in a successful way⁵⁰. Therefore, this paper shows that marketing automation can be used for such specific campaigns as well.

In 2020, Colja Dams is investigating the usage of marketing automation in a live environment to identify the advantages of using marketing automation at events. The pain point that should be reduced in this case was the usage of customer data that is gathered at events. Another aspect was to individualize the experiences that customers have with a brand at an event. The insights from this paper are that data that is collected at events need

⁴⁶ (Heimbach et al., 2015)

⁴⁷ (Hannig, 2017)

⁴⁸ (Vormelcher & Hoffmann, 2017)

⁴⁹ (Kissel, 2019)

⁵⁰ (Herrmann, 2017)

to be included into the companies' marketing automation system to get an improved understanding of the customer. In addition, including live experiences into the system can help to deliver a seamless omni-channel experience for the customers⁵¹. This is an interesting addition to the research as it shows that marketing automation is not only limited to digital channels.

Within his opinion piece that has been published in 2015, Anthony Bagshaw defined the term of marketing automation as well. In addition, he highlighted the potential that marketing automation can deliver for companies within online and offline channels. He stated further that marketing automation requires strategic planning that is following a clear goal. In case that this strategy is missing, he indicates the potential of failure⁵².

Vivien Kupplmayr took a deeper look at the successful implementation of marketing automation in general in 2017. She classified the implementation not only as a strategic approach but further as a structural change. Her results can be seen as another guideline for companies that aim to implement a marketing automation system including general practical recommendations⁵³.

Within his 'roadmap to marketing automation', Alexander Körner has, in 2017, also identified and summarized important steps for the implementation of marketing automation systems. He has further identified that the workload and the scope of the implementation is often underestimated which implies the need for awareness. Furthermore, Körner is connecting marketing automation with agile management⁵⁴.

This overview of literature concerning marketing automation shows the development of this instrument. The first literature dealt with marketing automation as a pure software solution that has impacts on the management. Over time, marketing automation was more and more understood as a holistic strategic approach within marketing that goes beyond the sole usage of software for automation. In addition, the literature covered, showed the connection between marketing automation and customer relationship management. Further, the importance of customer data and the analysis of the data for the usage of marketing automation were highlighted.

⁵¹ (Dams, 2020)

⁵² (Bagshaw, 2015)

⁵³ (Kupplmayr, 2017)

⁵⁴ (Körner, 2017)

2.2 Research question

The current literature has already covered many aspects concerning marketing automation systems and their usage. In addition, several authors deal with the steps that are necessary for the implementation. The given information delivers a general understanding of the term marketing automation. Further knowledge about potential use cases as well as the accompanied possibilities and challenges is delivered. Some of the authors have already investigated specific use-cases of marketing automation. Overall, there is still potential for further research that deals with specific use-cases of marketing automation in detail. As the main sources do not differentiate whether the system is used for the communication in one or more countries or languages, the international impact is uncovered so far. This is another opportunity for further research.

This thesis aims to connect the previously mentioned possibilities for further research. The thesis is going to focus on a defined structure of a marketing automation system. This structure is based on the insights from the literature research. The system includes the delivery of individualized content within international communication as personalization was identified to become more important within communication. In addition, the thesis aims to deliver practical insights and examples that are tailored towards the defined structure of marketing automation.

Therefore, the overall research question that the thesis is going to answer is:

How do companies use marketing automation within international communication to deliver personalized messages and what can medium-sized companies learn from these approaches?

This main research question includes the following two sub questions:

1. Which components are necessary for the implementation of a marketing automation system?
2. Which communication tools and channels can be used within marketing automation for the purpose of personalization?

Answering those three questions can deliver an overview of the potential of marketing automation.

As mentioned in the research question, the target group of the thesis are mainly medium-sized companies that are operating within an international context. The international context means communication in more than one language or operating in more than one country. Nevertheless, the thesis can be interesting for further companies as well, The targeted

reader is further planning to introduce a marketing automation system for the purpose of providing individualized content for their target customers.

The first goal of the thesis is to identify strategic aspects through case studies, examples, and the knowledge of experts within the field. The findings should enable to conclude practical recommendations for medium-sized companies. This includes the strategies that the cases / experts have used within the five identified steps of the defined structure of marketing automation systems.

The results of Kuppelmayr and Körner are thus far, the closest to the goals of this thesis. Nevertheless, the practical recommendations mentioned there are quite general. Therefore, these recommendations could account for other change processes affecting marketing, IT, and sales as well.

The methodology that is used to reach the goals of the thesis and to answer the research question is described in the following part. The structure of the marketing automation system that is used for the analysis will be described later in chapter five of the thesis.

3. Methodology and limitations

The topic of this thesis is very practical oriented. Nevertheless, there is the necessity of a theoretical background to enable the practical assessment. This requires a specific methodology to approach the topic properly. The methodology used for the analysis is described in the following part of the thesis. This is followed by showing the limitations of the content of the thesis.

3.1 Methodology

The theoretical background that will be delivered in the chapter four of this thesis is based on literature research. This approach is necessary as the theoretical background includes important definitions. Further, knowledge that is important to understand the overall topic and the analysis is delivered within the theoretical background. The literature research was done using search tools like Google Scholar or the library of the FH Vorarlberg (FHV). Further, the research was mainly done online. The sources that were used included eBooks as well as academic articles.

The structure of the marketing automation system that will be analyzed is described in chapter five of the thesis. The identified steps within the structure will be analyzed using multiple case studies. This approach enables a comparison of the actions that were taken within the cases. Further, similarities and differences between the systems and their establishment can be assessed. The identified patterns can then be used to conclude and define practical recommendations. The assessment of multiple cases is further helpful to identify whether international differences affect the marketing automation systems of different companies. In this way, cross-case patterns can be identified again and can be distinguished from specific challenges of some companies⁵⁵.

This multiple case study approach is based on the case study approach from Eisenhardt⁵⁶. According to Eisenhardt, the approach of analyzing case studies is suitable for new topic fields. As the trend of marketing automation can still be considered rather new, this is the first point why using case studies is a suitable approach for the thesis⁵⁷. Further, the usage of case studies is helpful to understand the usage of marketing automation in practice. This includes understanding the usage in different settings with different preconditions⁵⁸. As the number of cases used for the thesis is limited, the selection of the cases is crucial for the outcome and reliability of the thesis.

The goal of the thesis is to achieve a comparison how different companies use marketing automation within their communication. To achieve this comparison, it is necessary to select cases of companies that differ in the field of operation and products. Further, the goals that the companies want to achieve use marketing automation should be analyzed. This is because the goals can have an impact on the overall system. Therefore, the characteristics of the cases are important⁵⁹. Overall, the selection of cases can be classified as most different⁶⁰. This is due to the fact, that the cases are similar to most aspects of the structure of the used marketing automation systems. The cases differ in their goals concerning the usage of marketing automation. They are further not similar considering the size of the company and the industry in which they operate.

To support my findings, I aim to include experiences and the knowledge of experts. These experts will be for example employees from digital agencies (project manager or data experts). These experts deal with the implementation of marketing automation on a regular basis. I will further aim to get experiences from further experts. Those are not working at

⁵⁵ (Eisenhardt, 1989, p. 540)

⁵⁶ (Eisenhardt, 1989)

⁵⁷ (Eisenhardt, 1989, p. 532)

⁵⁸ (Eisenhardt, 1989, p. 534)

⁵⁹ (Seawright & Gerring, 2008, p. 296)

⁶⁰ (Seawright & Gerring, 2008, p. 298)

digital agencies. An example are employees that work for companies that have implemented a marketing automation system and that are responsible for the project. This will be done to include different viewpoints as well. I will collect these experiences and information through interviews as a part of the overall qualitative research. The knowledge of these experts can be helpful to close knowledge gaps from the literature research. In addition, the knowledge can be used to explain the steps that have been taken in the cases.

The interviews will be done in a semi-structured way. There are general questions that will apply to several participants. Nevertheless, there is the need for adaptation as the participants have different positions and therefore different experiences with marketing automation. The semi-structured interview will enable to dig deeper into the experiences of the experts. In addition, this approach gives flexibility without having the need to stick to the predefined questions. On the other side there are aspects that need to be covered in all interviews. Thus, a completely unstructured interview is not suitable⁶¹.

The interviews will further be held with individuals and not with groups. This is resulting from the goal of getting insights into personal experiences with marketing automation. In this case it would not be beneficiary to interview groups. A group could influence each other and the opinions which could lead to falsified results⁶². Due to the covid situation, the interviews cannot be done in a face-to-face environment. Therefore, the interviews will be held online using video calls. This is a form of internet interviews⁶³. Initially, eleven interviews were scheduled with experts of the mentioned fields. Due to timing issues of the participants, only five interviews could be held. The most important answers of these interviews are added in the appendix of this thesis.

Overall, each of the different research methods will deliver results. Those can, in combination, answer the research question and deliver the envisioned findings. The different insights can be merged to draw conclusions. As a result, practical recommendations for medium-sized companies that aim to implement a marketing automation system can be delivered.

⁶¹ (Brinkmann, 2020, p. 437)

⁶² (Brinkmann, 2020, p. 441)

⁶³ (Brinkmann, 2020, p. 442 f.)

3.2 Limitations

Overall, the research question as well as the analyzed structure of marketing automation, are dealing with several aspects concerning this instrument. Nevertheless, there will be boundaries concerning the context and content limitations as well.

Concerning the aspect of international communication, the scope will be on the countries in which the companies of the case studies operate. This is an important note as the analysis of other cases that operate in different countries could lead to different outcomes.

Another limitation is the identified structure of a marketing automation system that is the basis for the following analysis. The thesis will refer to a marketing automation system that includes the following steps: Data collection, Data analysis, Segmentation & Personas, Content creation & Channel selection and Evaluation & Improvement. The cases include further the delivery of individualized content. By this selection, the thesis will cover many parts that a marketing automation system can potentially include. Nevertheless, there are further use-cases of marketing automation that this thesis does not cover.

Marketing automation systems are dependent on the individual goals of a company and the individual use-cases. Therefore, there might be further aspects that the thesis will not cover. This can be aspects concerning different goals that should be reached through the usage. Many sources have already dealt with the description of the different steps of marketing automation systems. As a result, there are already some roadmaps or implementation guides for companies. The major focus of the thesis will therefore be on the analysis of the different cases and the experiences of experts. The findings can then be compared to the findings from previous research. Although the thesis should deliver practical recommendations as well, it should not be another implementation guide. The findings gained through the analysis should give insights about how the companies and experts have dealt with the impacts of the international context on the system.

Another limiting factor is that the conclusion that will be drawn from the analysis will focus on medium sized companies. The focus is necessary as companies of different sizes have different preconditions concerning the planning and execution of a marketing automation project. As a result, there might be different findings that account for small or large companies. Medium-sized companies were chosen as their usage of marketing automation systems is in an interesting stage of development. The limitation is only on the size of the companies and not on the industry.

4. Theoretical Framework

The following chapter of the thesis is focusing on delivering the relevant theoretical background that is necessary to understand the following analysis that is done in chapter five. This part will cover technologies as well as fields within the wide area of marketing. All of the aspects that will be covered are important for the understanding of the following analysis of marketing automation. Some of those parts are necessary to understand the categorization of marketing automation within the field of marketing. Further aspects that will be defined are necessary parts of a marketing automation system. The aim of this chapter is to draw the so-called overall “big picture”.

At first, the necessary definitions of the affected fields of marketing, marketing automation and further related fields, that will be touched in the analysis, are delivered. In a second step of this chapter, the defined parts are visualized graphically. This will be done to show the interrelationships and the dependencies of the several fields. In addition, the influence of some of the aspects on marketing automation is shown. This will be the visualization of the previously mentioned “big picture”. Overall, the following theoretical chapter will be the basis for the further analysis.

4.1 Relevant Definition

Marketing automation is a complex instrument that is connected to several tasks and areas of marketing. This fact arises the need to define marketing automation and those technologies or aspects of marketing that are connected to marketing automation. This will be done to understand the potential of the marketing automation system that will be analyzed within chapter 5 of the thesis. In addition to the definition of these aspects, it will be explained why they are necessary to understand marketing automation.

At first, the concerned aspects of marketing will be defined. This is followed by the definition of medium-sized companies. Medium-sized companies will be defined as the analysis should deliver conclusions accounting for those companies.

4.1.1 Marketing Automation

Marketing automation is a term that is used quite often in the recent years and is one of the new trends in digital marketing⁶⁴. The development of marketing automation started in the 1990ies when first companies started to offer software for marketing automation. Although this is a long time ago concerning the high speed in the evolution of technology and trends in marketing, the usage of marketing automation systems has increased rapidly in the recent years⁶⁵.

In its core, the term 'marketing automation' stands for the automatization of marketing processes through the usage of digital tools and software. This can include the processes of segmentation or the improvement of marketing campaigns⁶⁶. The instrument of marketing automation is often called Enterprise Marketing Automation (EMA)⁶⁷. Marketing automation can further be understood as a tool to make automated decisions concerning the marketing activities⁶⁸.

Generally, there are a lot of processes in the field of marketing that can be automated using marketing automation⁶⁹. In practice, marketing automation goes beyond this basic approach. According to Körner, marketing automation is connecting the aspects of content, data, and technology to merge them into a new strategy⁷⁰. Therefore, companies should use marketing automation as a long-term strategy. This includes all aspects of the system and affects not only the marketing department of a company⁷¹.

Marketing automation systems can include and affect several steps of the marketing activities and processes. According to Biegel, the process of marketing automation is generally defined as follows: The starting point is the intention of the marketing campaign. Next, data and content are required for the execution of the campaign. As a result, the campaign optimally leads to conversions and responses of (potential) customers⁷². These results are then measured and reported⁷³.

The overview given in the literature review, showed that marketing automation was recognized as a software solution at first. This was mainly focused on the delivery of software solutions for campaign management and email marketing. Over time, the

⁶⁴ (Semerádová & Weinlich, 2020, p. 58)

⁶⁵ (Lammenett, 2017, p. 460 f.)

⁶⁶ (Bagshaw, 2015)

⁶⁷ (Doyle, & Georghiou, 2001)

⁶⁸ (Semerádová & Weinlich, 2020, p. 54)

⁶⁹ (Kissel, 2019, p.1)

⁷⁰ (Körner, 2017)

⁷¹ (Kupplmayr, 2017 p. 150)

⁷² (Biegel, 2009, p.203)

⁷³ (Biegel, 2009, p. 206)

understanding of marketing automation changed from a sole software solution towards a strategic approach⁷⁴.

Although the term marketing automation is often used recently, automation systems are not newly invented. First automatization of processes started with the introduction of customer relationship management (CRM) tools that many companies use already⁷⁵. The details concerning CRM will be shown in the definition of customer relationship management that is following within the paragraphs of this chapter. Within this context, it is important to mention that CRM and marketing automation systems or software are not the same. Nevertheless, there are several touchpoints and a necessity for connecting the two systems⁷⁶. The integration is necessary for a seamless flow of data and an improved collaboration between the marketing and sales departments⁷⁷.

Therefore, marketing automation systems and software is not a 'stand-alone' solution. They cannot be introduced without a connection to other systems that the company uses. Further a connection to other departments, especially to the sales department is necessary⁷⁸. To use the system effectively, it needs to be integrated with several existing tools like CRM or enterprise resource planning (ERP) systems. In addition, changes of processes are necessary for a successful implementation of marketing automation systems⁷⁹.

Therefore, the introduction of marketing automation systems is a rather complex procedure⁸⁰. Further opportunities for the usage of marketing automation systems arise in the combination with the usage of Business Intelligence software⁸¹. As a result, the usage of marketing automation systems requires specific knowledge. This knowledge goes beyond the knowledge of classical marketing. This fact arises the need for trainings and coaching of the staff that is planned to work with the new system⁸².

The evaluation and continuous improvement of the system is another relevant part. The system enables companies to collect data and information about their customers. These data can be used to improve the system and additionally to improve the companies' products or services⁸³. In addition, data of the reaction to executed campaigns through marketing automation can be collected and help to improve future campaigns⁸⁴.

⁷⁴ (Mrohs, 2021, p. 250)

⁷⁵ (Biegel, 2009, p.204)

⁷⁶ (Redding, 2015, p.2)

⁷⁷ (Mrohs, 2021, p. 260 f.)

⁷⁸ (Kupplmayr, 2017 p. 153)

⁷⁹ (Doyle, & Georghiou, 2001)

⁸⁰ (Kupplmayr, 2017 p. 150 f.)

⁸¹ (Todor, 2016, p.2)

⁸² (Kupplmayr, 2017 p. 153)

⁸³ (Todor, 2016, p.1)

⁸⁴ (Heimbach et al., 2015, p. 130)

Marketing automation systems started mainly as solutions for campaign management⁸⁵. In the early stage of the development of marketing automation, this accounted especially for email marketing⁸⁶. Nevertheless, there was the necessity and the potential to automate further processes within marketing⁸⁷.

One of the core aspects of a marketing automation system is the management of customer data⁸⁸. This data can be collected within different channels⁸⁹. This data can then be used to manage the relationship with this customer throughout the whole customer journey⁹⁰. Therefore, it is necessary to update the data constantly ideally in real-time⁹¹. This data can be either stored centralized or decentralized depending on the companies' individual needs and structure⁹².

Within the campaign management, a marketing automation system can be used to identify which content will be displayed to which customer⁹³. In addition, the system should be able to determine in which channel the communication will take place and at which time⁹⁴. Marketing automation can further enable personalization of the marketing campaigns. This can be done for example through different content or design of the displayed message⁹⁵. This process is enabled through analysis of the customers' data. The analysis of data can be done for example through using scoring models⁹⁶. Another important aspect of marketing automation is the monitoring of the performance⁹⁷. These results can consequently be used for an evaluation and potential adaptation to improve future campaigns⁹⁸.

According to the literature that was researched, the main components of a marketing automation system have not changed tremendously over time. This includes the management of customer data that includes further the collection and analysis of data^{99 100}. Another main component is the creation of profiles of the customers¹⁰¹. Within the task of lead scoring, users can be scored and segmented based on their behavior¹⁰². Lastly, the

⁸⁵ (Doyle, 2000, p.87)

⁸⁶ (Irina, 2016, p.2)

⁸⁷ (Doyle, 2000, p.87)

⁸⁸ (Semerádová & Weinlich, 2020, p. 55)

⁸⁹ (Semerádová & Weinlich, 2020, p. 55)

⁹⁰ (Schumacher, 2020, p. 309)

⁹¹ (Schumacher, 2020, p. 308)

⁹² (Doyle, 2000, p.88)

⁹³ (Interview 4: SEA Campaign marketing manager, Appendix, p.115)

⁹⁴ (Doyle, 2000, p.88)

⁹⁵ (Semerádová & Weinlich, 2020, p. 55)

⁹⁶ (Doyle, 2000, p.89)

⁹⁷ (Doyle, 2000, p.91)

⁹⁸ (Mrohs, 2021, p. 249)

⁹⁹ (Kissel, 2019, p. 5)

¹⁰⁰ (Lammenett, 2017, p. 465)

¹⁰¹ (Mrohs, 2021, p. 250)

¹⁰² (Semerádová & Weinlich, 2020, p. 55)

creation and execution of campaigns is a possible function of marketing automation¹⁰³. These campaigns can be tailored to the customers based on the created customer profile and segmentation¹⁰⁴. These components are part of the analysis in chapter five.

Overall, the given definition of marketing automation is giving a first insight into the potential of the system. To understand the full potential of marketing automation, influencing factors and related field of marketing are defined in the following paragraphs.

4.1.2 Marketing

As mentioned before, marketing is a large field that includes several different sub-categories. Concluding from the definition of marketing automation, this instrument can be used within most of those categories and tasks, depending on the individual use-cases of a company. To understand the potential of marketing automation, it is necessary to define marketing and the associated tasks at first.

Marketing means that a company is oriented on the market in which it operates¹⁰⁵. Marketing consists further of several different tasks. One of them is for example market research that aims to deliver knowledge and information about markets and potential customers¹⁰⁶. This includes the task of segmentation where customers are grouped based on predefined characteristics¹⁰⁷. Another sub-task that is included here is the analysis of competitors and their products that are operating on the same market¹⁰⁸. Further the changes within the market need to be identified to detect the need for potential adaptations¹⁰⁹.

Considering marketing and “classical” marketing, there are several definitions available that focus on different aspects. Some of them focus on the purpose of marketing whereas other definitions are focusing on the tasks and the fields within marketing.

¹⁰³ (Lammenett, 2017, p. 466)

¹⁰⁴ (Semerádová & Weinlich, 2020, p. 55)

¹⁰⁵ (Bruhn, 2019, p. 13)

¹⁰⁶ (Kalka & Mäßen, 2018, p. 6)

¹⁰⁷ (Kalka & Mäßen, 2018, p. 17 ff.)

¹⁰⁸ (Bruhn, 2019, p. 19)

¹⁰⁹ (Bruhn, 2019, p. 14)

“The aim of marketing is to create value for customers in order to capture value from customers in return” Kotler & Armstrong 2021¹¹⁰

This definition by Kotler and Armstrong is clearly focusing on value and the purpose of marketing. Additionally, Kotler is describing the task of marketing as the management of customer relationships. This includes that the delivery of superior value for the customers is a necessary task of marketing¹¹¹.

The marketing process according to Kotler and Armstrong is visualized in the following figure:

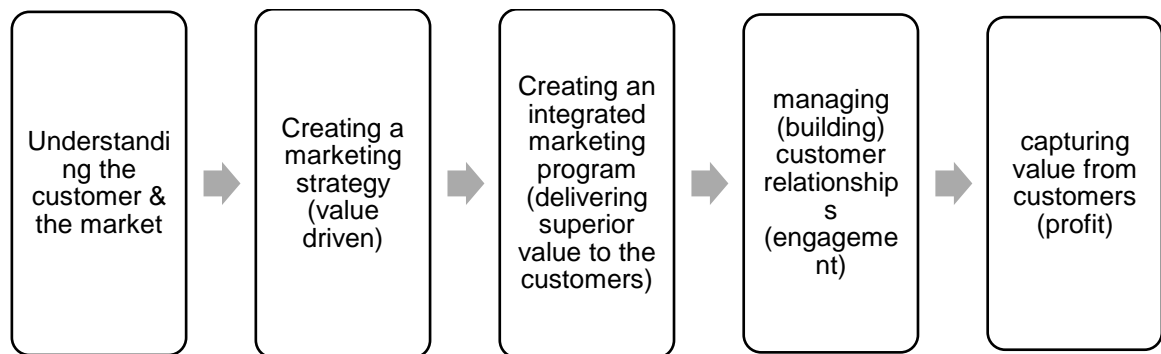


Figure 2: The marketing process according to Kotler and Armstrong¹¹²

Another defining theory of marketing is the theory of the 4 (7) P's that defines the marketing mix¹¹³.

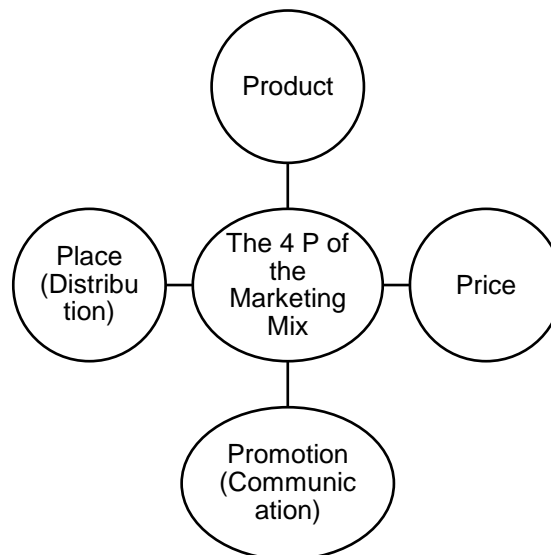


Figure 3: The 4 P's of the marketing mix¹¹⁴

¹¹⁰ (Kotler & Armstrong, 2021, p.22)

¹¹¹ (Kotler & Armstrong, 2021 p.24)

¹¹² Figure created by author based on (Kotler & Armstrong, 2021, p.26)

¹¹³ (Kubicki, 2018, p.4)

¹¹⁴ Figure created by author based on (Kubicki, 2018, p. 8)

Within each of those four areas, activities are defined that shape the companies' appearance on the market. The aspect concerning product includes the decisions about the offered products. As the term already mentions, the aspect of price considers decisions about pricing. The area of place deals with decisions where the products should be available, and lastly promotion includes communication activities with the purpose of increasing sales¹¹⁵.

Given the definitions of marketing and marketing automation, marketing automation can be used for a variety of tasks. Regarding the definition of the 4 Ps of Marketing, automation of tasks and processes is possible in all the four Ps.

Within this thesis, a marketing automation system that is used within communication (promotion) is investigated. This is because the definitions and literature concerning marketing automation is often placing the instrument in the context of communication.

4.1.3 (International) Communication

As shown in the description of marketing, marketing communication is one field within a companies' marketing mix¹¹⁶. In addition, some of the parts that will be defined in the following paragraphs belong to the field of communication. As the thesis is investigating a marketing automation system that is used for international communication, this paragraph is delivering a deeper understanding of communication. In addition, specific challenges within international communication are included.

The term promotion is used to describe one field of marketing within the model of the 4 P's. Promotion is one of the tasks that belongs to a companies' communication. Nevertheless, communication is covering more than only promotion activities¹¹⁷. Marketing communication can include tasks like advertising, public relation, or digital marketing¹¹⁸.

The field of communication is facing new developments and trends in the recent years and ongoing¹¹⁹. One of those trends is for example the previously mentioned social media marketing that deals with communication in social networks¹²⁰. Another trend is the

¹¹⁵ (Kalka & Mäßen, 2018, p. 7)

¹¹⁶ (Grybs, M. 2014 p.156)

¹¹⁷ (Grybs, M. 2014 p.157)

¹¹⁸ (Kotler & Armstrong, 2021, p.410 f.)

¹¹⁹ (Grybs, M. 2014 p.156)

¹²⁰ (Grybs, M. 2014 p.162)

increased usage of personalized communication¹²¹. As the number of accessible channels and messages has increased in the recent years, there is further a growing necessity of an integrated communication¹²².

International communication can be characterized through cross border communication¹²³. Within international communication, cultural impacts and differences are important aspects. Those differences can further be barriers within communication¹²⁴. Therefore, there is the necessity to be aware these differences¹²⁵. Cultural differences, including different languages or different perceptions of messages are challenges for international communication. These aspects can lead to miscommunication and misunderstandings¹²⁶.

Overall, Marketing automation can be used within different tasks of a companies' international communication. The cases that will be analyzed in chapter five, show for which tasks in communication companies can use marketing automation.

4.1.4 Digital Marketing

As a result of the development of digitization, a new field within marketing has evolved. Digital marketing is therefore not a replacement of classical marketing but rather an addition that deals with marketing activities in digital channels¹²⁷. This part of marketing has become increasingly important¹²⁸. The development of digital marketing was further fueled by the development of several technologies like the internet or databases¹²⁹.

Overall, digital marketing means the creation of value for customers through the usage of digital technologies¹³⁰. Digital marketing consists of several different tools and tasks. Some of the most recognized ones are for example search engine optimization (SEO) activities, social media marketing or email marketing¹³¹. The goal of SEO activities is to reach a better ranking in the results of search engines. This means that the website or further channels will be displayed as one of the first results¹³². A further activity within digital marketing is E-

¹²¹ (Kotler & Armstrong, 2021, p.412)

¹²² (Kotler & Armstrong, 2021, p.414)

¹²³ (Grybs, M. 2014 p.157)

¹²⁴ (Tian, & Borges, 2011, p.110)

¹²⁵ (Tian, & Borges, 2011, p.111)

¹²⁶ (Tian, & Borges, 2011, p.111)

¹²⁷ (Terstiege, 2020, p.152)

¹²⁸ (Zahay, 2015, p. 4)

¹²⁹ (Zahay, 2015, p. 7 f.)

¹³⁰ (Herhausen et al., 2020, p. 276)

¹³¹ (Bala & Verma, 2018, p. 322)

¹³² (Terstiege, 2020, p. 152 f.)

Mail Marketing¹³³. Further, e-commerce and mobile marketing are considered as digital marketing¹³⁴.

Digital marketing integrates the tasks of selling to customers as well as interacting with them¹³⁵. This resulted in a change of the way of communication that became an interactive one¹³⁶. Another important aspect of digital marketing is the so-called content marketing that will be defined in one of the following paragraphs¹³⁷.

Within the digital environment the number of channels that can be used to communicate with customers, has increased tremendously¹³⁸. The website is one of the most important digital channels. This includes the design as well as the usability of the page¹³⁹. The content of this website is under full control of the company¹⁴⁰. It is therefore referred to as owned media¹⁴¹. Another digital channel that is becoming more and more important are social media platforms. Consequently, more companies are investing in Social Media Marketing¹⁴². Within the social media channels, there can be all forms of media: owned, paid, earned, and shared media¹⁴³. In addition, the mobile aspect is becoming increasingly important for digital marketing as well. This is due to the increased usage of smartphones and the increase in mobile commerce¹⁴⁴.

Overall, digital marketing needs to be based on a strategic approach that includes several business areas¹⁴⁵. Digital marketing includes further the necessity of developing new skills by the marketeers¹⁴⁶. Further, digital marketing is seen to be efficient concerning its cost of activities¹⁴⁷. Within the daily business, online and offline marketing activities are ideally connected to address the customers and their needs¹⁴⁸.

Referring to the definition of marketing automation that deals with the automatization of marketing activities and processes and considering the variety of channels and tasks within digital marketing, many opportunities can be identified in this context.

¹³³ (Terstiege, 2020, p.153)

¹³⁴ (Herhausen et al., 2020, p. 276)

¹³⁵ (Zahay, 2015, p. 4 f.)

¹³⁶ (Zahay, 2015, p. 11)

¹³⁷ (Bakhtieva, 2017, p. 465)

¹³⁸ (Zahay, 2015, p. 15)

¹³⁹ (Zahay, 2015, p. 27)

¹⁴⁰ (Terstiege, 2020, p.152)

¹⁴¹ (Zahay, 2015, p. 78)

¹⁴² (Terstiege, 2020, p.153 f.)

¹⁴³ (Zahay, 2015, p. 78)

¹⁴⁴ (Terstiege, 2020, p. 154)

¹⁴⁵ (Bakhtieva, 2017, p. 465)

¹⁴⁶ (Langan et al., 2019, p. 32)

¹⁴⁷ (Bala & Verma, 2018, p. 322)

¹⁴⁸ (Bala & Verma, 2018, p. 323)

4.1.5 Data-driven marketing

The next field of marketing that will be defined is data-driven marketing. Data driven marketing has already been done for several decades^{149 150}. Nevertheless, the field of data driven marketing has experienced a push through the development of digitization as the amount of data has increased tremendously¹⁵¹. Further, the sources where the data is gathered has increased through digitization¹⁵². As this increase is still going on and will not slow down in the near future, there will be several additional challenges arising concerning data-driven marketing. This affects ensuring the quality of data as well as the analysis of the data¹⁵³.

The digitization enables companies to use technologies that can gather and analyze data. The resulting insights can be used further to improve a companies' decision-making. As a result, data driven marketing can be used to tailor the messages to the users' interests¹⁵⁴. Besides the possibility of personalization, data can be used to improve the overall effectiveness of marketing campaigns¹⁵⁵. The overall goal is to use the gathered data to increase the benefits and satisfaction of customers¹⁵⁶. Further, within this approach, the reactions of the users on the advertisements are measured¹⁵⁷.

The results of the analyzed data can be used for a variety of decisions of tasks within marketing. This accounts also for the field of content marketing as the creation of content can be data-driven as well¹⁵⁸. Overall, the approach of data driven marketing can be used for decisions within online and offline marketing channels¹⁵⁹. The collected data can further be used within the data-driven approach to improve the planning process of a company¹⁶⁰.

Data driven marketing can be beneficial for both, the company, and the customers'¹⁶¹. This is because it is an approach that includes customer centricity and puts the customer into the focus¹⁶². Therefore, one aspect that is important within a data-driven approach is the mapping of the customers' journey that will be defined in one of the following paragraphs¹⁶³.

¹⁴⁹ (Shah & Murthi, 2021, p. 772)

¹⁵⁰ (Sheth & Kellstadt, 2021, p. 780)

¹⁵¹ (Shah & Murthi, 2021, p. 773 f.)

¹⁵² (Boßow-Thies et al., 2020, p. 4)

¹⁵³ (Sheth & Kellstadt, 2021, p.782)

¹⁵⁴ (Große Holtforth et al., 2020, p. 25)

¹⁵⁵ (Große Holtforth et al., 2020, p. 26)

¹⁵⁶ (Boßow-Thies et al., 2020, p. 6)

¹⁵⁷ (Große Holtforth et al., 2020, p. 26)

¹⁵⁸ (Wilson, 2019)

¹⁵⁹ (Boßow-Thies et al., 2020, p. 6)

¹⁶⁰ (Große Holtforth et al., 2020, p. 30)

¹⁶¹ (Micheaux & Bosio, 2019, p. 127)

¹⁶² (Micheaux & Bosio, 2019, p. 129)

¹⁶³ (Micheaux & Bosio, 2019, p. 127)

Overall, within the approach of data-driven marketing, any marketing activity is based on the collected and analyzed data. This includes activities within any step of the customer journey¹⁶⁴.

Data driven marketing requires a corporate structure that accepts the usage of data and incorporated data within several processes. This includes that several departments and business processes are integrated in the overall approach. Further there is the necessity to integrate all data into a central data base¹⁶⁵.

Aspects concerning data privacy and data protection are affecting the usage of data¹⁶⁶. Consequently, another challenge for data-driven marketing within the European union (EU) and other countries is the data protection law¹⁶⁷. The law has established limitations in the collection methods and the usage of data¹⁶⁸. Further, the storage of personal data is regulated. In addition, violations of the law are sanctioned with high fines¹⁶⁹.

Data-driven marketing includes that decisions are done based on the results of marketing research and the results of market analysis. These decisions can include decisions concerning the marketing activities as well as the overall positioning¹⁷⁰. As most marketing automation systems include the collection and analysis of data as a basis for further activities, these two fields are closely connected.

4.1.6 Inbound Marketing

Inbound marketing is another buzzword within marketing in the recent years. Like further trends and developments within marketing, inbound marketing has been enabled through the development of digitization¹⁷¹. Inbound marketing aims to make use of the initiative of customers. In addition, this engagement of the customers should be triggered through different tools¹⁷². Therefore, inbound marketing is a pull approach where customers should be actively pulled to the company. In contrast, within a push approach, messages are pushed towards the customers¹⁷³. The development of inbound marketing has been fueled by the change of media consumption of the customers. A further reason is the overload of

¹⁶⁴ (Große Holtforth et al., 2020, p. 27)

¹⁶⁵ (Große Holtforth et al., 2020, p. 28)

¹⁶⁶ (Boßow-Thies et al., 2020, p. 22)

¹⁶⁷ (Possekel & Sven, 2020, p.52)

¹⁶⁸ (Possekel & Sven, 2020, p.54 ff.)

¹⁶⁹ (Possekel & Sven, 2020, p.53)

¹⁷⁰ (Sheth & Kellstadt, 2021, p.780)

¹⁷¹ (Opreana & Vinerean, 2015, p.29)

¹⁷² (Belz, 2009)

¹⁷³ (Halligan & Shah, 2014, p. XVIII)

information that a customer can receive. According to Opreana & Vinerean, the tools that belong to inbound marketing are search engine optimization (SEO), social media marketing, or content marketing¹⁷⁴.

The task of content marketing is going to be defined in detail within the following paragraphs as content marketing is an important part of marketing automation systems. The further tools of inbound marketing according to Opreana & Vinerean are shortly explained.

The goal of search engine optimization is to improve the ranking within the results of search engines. As a result, the content and channels of a company can be accessed more easily and can attract more users of search engines¹⁷⁵.

Social media marketing deals with the distribution of content in social networks. Another aspect of social media marketing is the communication and interaction with the users of those channels¹⁷⁶.

Another tool of inbound marketing is communication that is focused on the brand itself. This aspect includes again a necessity of consistency within the different channels. The goal of brand-focused communication is to deliver an authentic image of the brand. This should further lead to the perception of a relevant brand¹⁷⁷.

In addition, inbound marketing is characterized through engagement and interactive communication. A result of inbound marketing is the potential to build customer relationships that are valuable for both sides¹⁷⁸. Targeting an active customer can be helpful as there is the chance to reach them with the right messages at the right time¹⁷⁹.

Using inbound marketing can be helpful in attracting customers that are of high quality as they are actively engaging¹⁸⁰. According to Soegoto & Simbolon, the type of content that is used within inbound marketing is preferred by the users¹⁸¹.

According to this definition, there are several touchpoints between inbound marketing and marketing automation. As a result, many aspects of inbound marketing can be enabled or be processed more efficiently through the usage of marketing automation.

¹⁷⁴ (Opreana & Vinerean, 2015, p.30)

¹⁷⁵ (Opreana & Vinerean, 2015, p.31)

¹⁷⁶ (Opreana & Vinerean, 2015, p.31)

¹⁷⁷ (Opreana & Vinerean, 2015, p.32)

¹⁷⁸ (Opreana & Vinerean, 2015, p.30)

¹⁷⁹ (Belz, 2009)

¹⁸⁰ (Soegoto & Simbolon, 2018, p.1)

¹⁸¹ (Soegoto & Simbolon, 2018, p.4)

4.1.7 Artificial Intelligence

Artificial intelligence has the potential to influence marketing nowadays and in the future. In addition, the technology might further lead to changes within the behavior of customers¹⁸². Overall, the technology is likely to be incorporated into the daily live¹⁸³. Nevertheless, artificial intelligence has already been developed many years ago¹⁸⁴. The field and the science of artificial intelligence (AI) has developed at a high speed in the recent years and ongoing¹⁸⁵. Within the science of artificial intelligence, human cognitive abilities and decision-making abilities are transferred to digital and computer-based systems¹⁸⁶.

The technology of artificial intelligence can be used within the analysis of data¹⁸⁷. In addition, the technology can draw conclusions from the results of the analysis that can result in decisions and actions¹⁸⁸. This is since artificial intelligence can identify patterns within the collected information¹⁸⁹. Further, AI can be used for the task of segmentation¹⁹⁰. Overall, Artificial Intelligence is dependent on data about the customers including information about the contacts of the customers with a company¹⁹¹. Consequently, data privacy is an issue that is affecting the usage of artificial intelligence as well as AI can work with customers data¹⁹².

Another aspect of marketing where AI can be used is the personalization¹⁹³. With the usage of AI, companies are enabled to deliver tailored messages in real-time¹⁹⁴. Over time, the technology can include learnings into the system. This enables an improved knowledge of the customer that can lead to improved actions. This can include the selection and display of personalized advertisements and content¹⁹⁵. One example for this approach is the display of recommendations¹⁹⁶. Further, the creation of content can be realized through the usage of AI¹⁹⁷.

¹⁸² (Davenport et al. 2020, p. 24)

¹⁸³ (Haenlein & Kaplan, 2019, p. 9)

¹⁸⁴ (Haenlein & Kaplan, 2019, p. 6)

¹⁸⁵ (Wagener, 2019, p.17)

¹⁸⁶ (Wagener, 2019, p.18)

¹⁸⁷ (Davenport et al. 2020, p. 25)

¹⁸⁸ (Kumar et al., 2019, p. 136)

¹⁸⁹ (Kozinets & Gretzel, 2021, p. 156 f.)

¹⁹⁰ (Devang et al., 2019, p.35)

¹⁹¹ (Kumar et al., 2019, p. 139)

¹⁹² (Davenport et al. 2020, p. 38)

¹⁹³ (Davenport et al. 2020, p. 25)

¹⁹⁴ (Davenport et al. 2020, p. 26)

¹⁹⁵ (Kumar et al., 2019, p. 138)

¹⁹⁶ (Bratić, et al. 2020, p. 743)

¹⁹⁷ (Devang et al., 2019, p. 35)

One practical application of AI in marketing activities are so-called bots¹⁹⁸. Another channel where Artificial Intelligence is used within marketing is a companies' website. There, the content can be personalized for the users through AI¹⁹⁹. Consequently, Artificial intelligence is a technology that is suitable to be used within marketing automation.

4.1.8 Content Marketing

Another field within marketing and digital marketing is content marketing that has been mentioned before in the current trends of marketing. Unlike other trends that disappear as quickly as they appeared in the market, content marketing became an important part of marketing activities²⁰⁰. Additionally, content marketing is not only a task of online marketing but also of offline marketing. Overall, content marketing is an important field within a companies' communication^{201 202}.

Content Marketing is recognized as a strategic approach that goes beyond the understanding of the usage as a communication tool²⁰³. This is because content marketing can be done within the different communication tools²⁰⁴. Content marketing is part of a so-called pull strategy that is customer focused²⁰⁵. Therefore, content marketing is a part of inbound marketing²⁰⁶. Content marketing does not only exist within the communication with customers. It can further be used within the communication towards other stakeholder groups like investors or employees²⁰⁷.

The aim of content marketing is to deliver relevant content that is attracting the defined target group. This can include informative or engaging content that goes beyond product information²⁰⁸. Therefore, content marketing is not the same as advertising²⁰⁹. This results from the content and the purpose that content marketing should serve²¹⁰. Content can be provided in different formats including text, pictures, or videos^{211 212}. Content marketing

¹⁹⁸ (Davenport et al. 2020, p. 26)

¹⁹⁹ (Kumar et al., 2019, p. 138)

²⁰⁰ (Uhl, 2020, p.1)

²⁰¹ (Uhl, 2020, p.3 ff.)

²⁰² (Interview 2: Content Marketing Manager, Appendix, p. 110)

²⁰³ (Lammenett, 2021, p. 337)

²⁰⁴ (Lammenett, 2021, p. 340)

²⁰⁵ (Lammenett, 2021, p. 339)

²⁰⁶ (Järvinen & Taiminen, 2016, p. 164)

²⁰⁷ (Uhl, 2020, p.43)

²⁰⁸ (Lammenett, 2021, p. 337)

²⁰⁹ (Lammenett, 2021, p. 338 f.)

²¹⁰ (Uhl, 2020, p.13 ff.)

²¹¹ (Schauer-Bieche, 2019, p. 14 ff.)

²¹² (Opreana & Vinerean, 2015, p.31)

should further be used within every communication channel of a company²¹³. This includes online channels as well as offline channels²¹⁴. The created content should be characterized through consistency across all channels²¹⁵.

Another important aspect within content marketing is the so-called storytelling. This is used to add further value to the company's content and communication²¹⁶. Content marketing can be used to strengthen the own brand. In addition, content marketing can be helpful in attracting new customers and to strengthen the customer relationship²¹⁷. Content marketing can be also helpful in creating awareness of a brand. Further, the image of a brand can be shaped through the usage of content marketing²¹⁸.

Although the term is only used since the early 2000s, the task of content marketing has already existed before²¹⁹. The usage of content marketing started to increase tremendously since 2013²²⁰. Therefore, this strategic approach can be considered as one of the recent trends within marketing. This development was fueled through the changing customer behavior within digital channels²²¹. As a result, users want to receive relevant content whenever they want and wherever they are²²². The overload of accessible content is another challenge for content marketing²²³. Further, the changing behavior resulted in a decreasing efficiency of "classical" advertising²²⁴. Nevertheless, several companies realized the importance of content quite a few years earlier²²⁵.

Alike other strategic approaches, content marketing can be assisted through the usage of software and automations²²⁶. This can include software for content creation or for the management of content projects²²⁷. Content marketing is further closely connected to the task of search engine optimization as optimized content can improve the ranking of websites²²⁸.

As the definition shows, content marketing is an important and necessary field for a companies' communication²²⁹. As the marketing automation system that is analyzed within

²¹³ (Lammenett, 2021, p. 337)

²¹⁴ (Schauer-Bieche, 2019, p. 34 ff.)

²¹⁵ (Opreana & Vinerean, 2015, p.31)

²¹⁶ (Uhl, 2020, p.17)

²¹⁷ (Hilker, 2017, p. 5)

²¹⁸ (Lammenett, 2021, p. 342 ff.)

²¹⁹ (Heinrich, 2020, p.2)

²²⁰ (Lammenett, 2021, p. 341)

²²¹ (Lammenett, 2021, p.341 f.)

²²² (Uhl, 2020, p.5 f.)

²²³ (Uhl, 2020, p.7)

²²⁴ (Hilker, 2017, p. 2)

²²⁵ (Schauer-Bieche, 2019, p.10 ff.)

²²⁶ (Interview 2: Content Marketing Manager, Appendix, p. 109)

²²⁷ (Lammenett, 2021, p. 363)

²²⁸ (Lammenett, 2021, p. 346 f.)

²²⁹ (Interview 2: Content Marketing Manager, Appendix, p. 110)

this thesis is used for international communication, content marketing is also an important part for this system. Consequently, within marketing automation, content marketing is necessary to define and create the content that is then displayed to the individual customers.

4.1.9 Customer-Relationship-Management (CRM)

Customer relationship management is not one of the new trends that have been described within the first chapter of this thesis. Moreover, it has been done within stores for many years²³⁰. As the term already mentions, customer-relationship-management deals with the management of customers and the relationships to them. The aim is to strengthen those relationships to turn them into long term relationships²³¹. An improved focus on customer relations has the potential to lead to competitive advantages²³². The main goal of improving relationships with customers includes further goals. These can be the improvement of processes and of customer data analysis²³³. Overall, customer relationship management is a customer centric approach. According to Wang and Feng, the major goals of CRM are the management of customer interaction, the improvement of the relationship and winning back lost customers²³⁴.

The establishment of a good relationship with customers necessitates to know the customer and their needs²³⁵. This aspect is part of the analytical customer relationship management²³⁶. Another aspect that is required within CRM is the differentiation between customers as they need to be treated differently²³⁷.

The task of customer relationship management usually affects the marketing and the sales department and is nowadays often done using CRM software²³⁸. As the software can analyze customer data, and thus automate the process of analysis, it can be seen as a single use-case of marketing automation²³⁹. Nevertheless, as mentioned before, CRM and marketing automation are not the same. The CRM software products can include several different components like databases. Further, the functionalities can differ²⁴⁰. The decision

²³⁰ (Helmke et al., 2013, p.6)

²³¹ (Wang & Feng, 2012, p. 117)

²³² (Helmke et al., 2013, p.6)

²³³ (Helmke et al., 2013, p.10)

²³⁴ (Wang & Feng, 2012, p. 118)

²³⁵ (Gebert et al 2003, p.107)

²³⁶ (Hippner & Wilde, 2013, p.181)

²³⁷ (Helmke et al., 2013, p.16)

²³⁸ (Helmke et al., 2013, p.7)

²³⁹ (Wang & Feng, 2012, p. 119)

²⁴⁰ (Helmke et al., 2013, p.10)

which components are required depend on the individual preconditions and goals of a company²⁴¹. This is like the decision making concerning the selection of a marketing automation system. In any case, the CRM software should be closely connected to other processes within the company²⁴². Further, it should be connected to the other aspects of the marketing automation system so that it is one integrated system²⁴³.

Nevertheless, the task of customer-relationship-management will become more important in the future as the focus on customer centricity is increasing²⁴⁴. CRM requires further the generation of a strategy concerning customer orientation²⁴⁵. This includes an integrated approach that includes several business activities and is based on the customers' needs and customer satisfaction. This integration includes the departments of marketing and sales as well as customer service²⁴⁶.

The literature that was presented within the chapter of the literature review has already shown the close connection between CRM and marketing automation. Therefore, it is important to understand the necessity and the tasks of customer relationship marketing.

4.1.10 Customer Journey

The term customer journey describes the customers process concerning the services of a company. This journey includes all interactions that take place between a company and their customers²⁴⁷. In addition, the customer journey is reflecting the touchpoints and the experiences between a company and the customer²⁴⁸. Those touchpoints can be for example a companies' website, advertising campaigns but also product ratings²⁴⁹. Some of those touchpoints can be under full control of the company while others are not²⁵⁰. The customer journey covers further all stages from awareness of a product or brand to the purchase decision and further after sales stages reflecting customer loyalty²⁵¹. Overall, the customer journey is characterized through customer centricity as the journey represents the view of the customers²⁵².

²⁴¹ (Helmke et al., 2013, p.18)

²⁴² (Helmke et al., 2013, p.267)

²⁴³ (Wang & Feng, 2012, p. 119)

²⁴⁴ (Helmke et al., 2013, p.20)

²⁴⁵ (Helmke et al., 2013, p.269)

²⁴⁶ (Helmke et al., 2013, p.7)

²⁴⁷ (Følstad & Kvale, 2018, p.197)

²⁴⁸ (Kotler & Armstrong, 2021, p. 173 f.)

²⁴⁹ (Kruse Brandão & Wolfram, 2018, p.95)

²⁵⁰ (Nam & Kannan, 2020, p. 29)

²⁵¹ (Følstad & Kvale, 2018, p.198)

²⁵² (Følstad & Kvale, 2018, p.207)

The customer journey is further a tool that can help companies to understand their customers and the customers behavior²⁵³. It is additionally helpful to detect so-called pain points within the journey²⁵⁴. As a result, additional opportunities for improvement can be recognized through a customers' journey²⁵⁵. Those pain points should then be analyzed in detail to reduce and eliminate the pain points within the customer journey²⁵⁶.

Customer journeys can additionally be visualized within maps²⁵⁷. Mapping a customer journey can help to understand the customer as it can be identified what they are experiencing in which stage²⁵⁸. Within this map, the touchpoints that exist within the journey are pictured. This is done using a timeline that is reflecting the process²⁵⁹.

Considering the international context, customer journeys can differ within different countries. This can be influenced through different cultures as well as through a difference in behavior²⁶⁰. This fact leads to the conclusion that companies that operate internationally need to know the differences within the customer journeys within the served countries²⁶¹. Consequently, there might be the need to adapt strategies throughout different countries.

As the customer journey includes communication, marketing automation can be used for communication within several steps of the customers' journey. Consequently, companies that aim to implement marketing automation should know their customers journey and the included touchpoints. This knowledge can enable a company to decide in which steps an automated marketing communication is useful.

As the customer journey includes experiences of the customer, the concept is closely connected to the concept of delivering customer experiences. The analysis and the knowledge about the customer journey can be used as a basis to design a customer experience strategy that is going to be defined in the next paragraph.

²⁵³ (Tueanrat et al., 2021, p.336)

²⁵⁴ (Tueanrat et al., 2021, p.336)

²⁵⁵ (Villani, 2018, p. 84 ff.)

²⁵⁶ (Tiffert, 2019, p. 25 f.)

²⁵⁷ (Følstad & Kvale, 2018, p.198)

²⁵⁸ (Kotler & Armstrong, 2021, p. 174)

²⁵⁹ (Rosenbaum et al., 2017, p. 144)

²⁶⁰ (Nam & Kannan, 2020, p. 30)

²⁶¹ (Nam & Kannan, 2020, p. 42)

4.1.11 Customer Experience

The creation of customer experiences is another aspect that is becoming increasingly important for companies²⁶². This task has experienced a push through the development of digitization and new technologies that are arising through this development²⁶³. This is because these technologies deliver the possibility to increase the efficiency in creating customer experiences²⁶⁴. In addition, the recent developments enable increasing interactions between customers and companies in a variety of channels. As a result, the attention of companies on customer experience is rising²⁶⁵. Nevertheless, there has always been some sort of experience in the interaction between companies and their customers and first studies about this topic have already been done in the 60ies²⁶⁶.

The term customer experience describes the customers experiences and their resulting responses with a company^{267 268}. This includes the interactions that take place between a company and their customers^{269 270}. The customer experience is not only characterized by the interactions but also by the emotions of the customers and how they perceive the interactions²⁷¹. Overall, the approach of focusing on customer experiences and managing these is another methodology of a customer centric strategy²⁷². As the customer experience consists of all interactions between a company and the customer, the creation of positive customer experiences necessitates further the incorporation of several processes and functions aside from the marketing activities²⁷³. Therefore, customer experience is not a single tool. Creating and managing customer experience requires a strategic approach that includes constant adaptation towards the changing needs²⁷⁴.

The management of customer experience is further not only a task within the digital environment. Like the customer journey, customer experience is experienced at online and offline touchpoints and should ideally deliver a seamless omni-channel experience. Within the recent years, managing customer experience has become increasingly complex and highly competitive²⁷⁵.

²⁶² (Lemon & Verhoef, 2016, p.69)

²⁶³ (Villani, 2018, p.2 f.)

²⁶⁴ (Peppers et al., 2016, p.3)

²⁶⁵ (Lemon & Verhoef, 2016, p.69)

²⁶⁶ (Tiffert, 2019, p. 5)

²⁶⁷ (Siebert et al., 2020, p.46)

²⁶⁸ (Lemon & Verhoef, 2016, p.70)

²⁶⁹ (Peppers et al., 2016, p.22)

²⁷⁰ (Tiffert, 2019, p. 6 ff.)

²⁷¹ (Suwelack, 2020, p.4 f.)

²⁷² (Theobald & Jentschke, 2020, p.2)

²⁷³ (Lemon & Verhoef, 2016, p.69)

²⁷⁴ (Villani, 2018, p.25 f.)

²⁷⁵ (Villani, 2018, p.21)

Delivering a great customer experience requires in addition the focus on customer centricity. This includes understanding the customers and their needs²⁷⁶. Knowing the customer enables companies to tailor their communication towards the customers. Nowadays, there is a high amount of data about the customers available. This includes their digital behavior, preferences, personal data, and more. Using this data in the design of the customer experience enables companies to tailor their communication and other activities to the customers²⁷⁷. Additionally, the competitors need to be analyzed. This includes the customer experience that they deliver²⁷⁸. An outstanding customer experience can be a differentiating factor and can be the reason why customers choose one brand or company over another. As customer experience is a field that is constantly evolving and changing, the competitors' need to be monitored constantly to detect changes within their strategy at an early stage²⁷⁹.

The delivery of positive customer experience should have the potential to influence the overall customer journey in a positive way²⁸⁰. In addition, these experiences aim to build trust and customer loyalty²⁸¹. Another goal that should be achieved through designing and delivering customer experiences is to improve and strengthen customer satisfaction²⁸².

Managing the customers experiences within all touchpoints in all steps between the company and their customers can result in a so-called customer experience journey²⁸³. This is an addition to the previously described concept of the customers' journey. The existence of the term customer experience journey shows the importance of managing customer experiences across the whole journey. Those customer experience journeys can be created in different variations. Siebert et al identified for example two major forms: a smooth journey and a sticky journey model²⁸⁴.

Overall, customer experience should be a strategic approach that is ideally supported by the companies' top management²⁸⁵. In addition, the experience should be seamless throughout all channels and touchpoints. The so-called omni-channel experience²⁸⁶.

The usage of marketing automation for communication purposes has the potential to shape a customers' experience. This results from the definitions of customer experience and communication.

²⁷⁶ (Villani, 2018. P.34)

²⁷⁷ (Villani, 2018, p. 55)

²⁷⁸ (Villani, 2018, p.38)

²⁷⁹ (Villani, 2018, p. 38)

²⁸⁰ (Lemon & Verhoef, 2016, p.69 f.)

²⁸¹ (Theobald & Jentschke, 2020, p.2)

²⁸² (Tiffert, 2019, p. 17)

²⁸³ (Siebert et al., 2020, p.46)

²⁸⁴ (Siebert et al., 2020, p.49)

²⁸⁵ (Villani, 2018, p. 41 & 48)

²⁸⁶ (Villani, 2018, p. 115 f.)

4.1.12 Behavioral Advertising

Behavioral Advertising is one aspect of personalized communication that is becoming more and more common. More precisely, behavioral advertising belongs to the category of personalized advertising²⁸⁷. In addition, behavioral advertising can be considered as a part of data-driven marketing as it enabled through the collection and usage of data about the user's behavior. Through the usage of behavioral advertising, users will receive and see advertisements based on their online behavior²⁸⁸. Behavioral advertising therefore differs from selecting advertisements based on segments as the displayed ads are selected for each user individually²⁸⁹.

Within behavioral advertising data is gathered about the digital behavior of targeted users. This data is then used to decide which advertisement is displayed to the individual user²⁹⁰. The collected data include the visited pages as well as the online shopping behavior of users²⁹¹. One of the tools to collect user data are the so-called cookies. These are placed on website and can register when a user is visiting the website²⁹². As a result, profiles of the users are created based on the collected behavioral data²⁹³.

As this form of advertising is dependent on data, it is influenced by data protection laws as well. Within the European Union, the law requires that the users must have the option to allow or decline the usage of cookies for tracking their data. Therefore, behavioral advertising within the EU is only possible with the consent of the users²⁹⁴.

Nevertheless, behavioral advertising enables companies to display ads that are relevant for the individual users and potential customers. This can further be beneficiary for the users as they get information and ads about products that can be of interest for them. This is only the case if they accept the tracking tools²⁹⁵. On the other side, behavioral advertising can occur negative perception as well based on concerns about data privacy²⁹⁶.

Overall, behavioral advertising has the potential to be more effective compared to displayed ads that are not selected based on the users' behavior²⁹⁷.

²⁸⁷ (Mpinganjira & Maduku, 2019, p.464)

²⁸⁸ (Labrecque et al., 2021, p. 45)

²⁸⁹ (Labrecque et al., 2021, p.45)

²⁹⁰ (McDonald & Cranor, 2010, p.2)

²⁹¹ (Labrecque et al., 2021, p.45)

²⁹² (McDonald & Cranor, 2010, p.2)

²⁹³ (Labrecque et al., 2021, p. 45)

²⁹⁴ (Smit et al., 2014, p.15)

²⁹⁵ (Mpinganjira & Maduku, 2019, p.464)

²⁹⁶ (Labrecque et al., 2021, p.45)

²⁹⁷ (Chen & Stallaert, 2014, p. 430)

Behavioral advertising can be one form of communication that can be enabled through a marketing automation system. The analysis of the cases in chapter five can will show whether the selected companies use marketing automation for behavioral advertising.

4.1.13 Personas

Personas can be a helpful tool within an approach of customer centricity²⁹⁸. A persona is a description of a fictional but realistic person that represents a typical customer or a target group. Therefore, a persona summarizes characteristics and information about similar customers²⁹⁹. Ideally, a persona is created for every segment and target group³⁰⁰. Overall, there are information about the persona's biography as well as information about interests or personal goals³⁰¹. In addition, personas can describe the needs of the represented customers³⁰². The description of personas usually contains a picture, a real name, and information about a job or hobbies³⁰³.

The usage of personas can be a helpful tool as it enables to include the customers' viewpoints³⁰⁴. To use the personas in an ideal way, the creation of personas should be as detailed as possible but not too specific³⁰⁵. The creation of personas requires knowledge about the target group that should be represented. Therefore, collecting and analyzing information of the customers and target group is an essential step³⁰⁶.

Personas are often used within design processes³⁰⁷. Another field where personas can be used is inbound marketing³⁰⁸. In addition, they can be used for communication as well. This can include the usage for content marketing or campaigns³⁰⁹. Concerning communication, personas are useful as they enable a tailored communication. This is because their needs and interests can be addressed directly as they are known³¹⁰. Additionally, the preferred

²⁹⁸ (Miaskiewicz & Kozar, 2011, p.418)

²⁹⁹ (Miaskiewicz & Kozar, 2011, p.418)

³⁰⁰ (Schweibenz, 2004, p.153)

³⁰¹ (Villani, 2018, p. 78 ff.)

³⁰² (Miaskiewicz & Kozar, 2011, p.418)

³⁰³ (Miaskiewicz & Kozar, 2011, p.419)

³⁰⁴ (Schweibenz, 2004, p.152)

³⁰⁵ (Schweibenz, 2004, p.152)

³⁰⁶ (Schweibenz, 2004, p.153)

³⁰⁷ (Miaskiewicz & Kozar, 2011, p.419)

³⁰⁸ (Kirchem & Waack, 2021, p.15)

³⁰⁹ (Kirchem & Waack, 2021, p.5)

³¹⁰ (Kirchem & Waack, 2021, p.4)

channels can be identified through the creation of personas³¹¹. As customer behavior can change over time, the created personas need to be evaluated and adapted over time³¹².

Overall, personas can be a useful tool for marketing automation that is used for communication purposes. The described attributes for personas can be included in the automated processes.

4.1.14 Medium-Sized Companies

The focus of the thesis is not only on the usage of marketing automation within international communication. The following analysis of different cases should enable conclusions how medium-sized companies can use marketing automation efficiently. The additional focus is necessary because companies of different sizes have different preconditions. Medium-sized companies were chosen as they deliver the opportunity for interesting use-cases. According to Statista, the number of medium-sized companies in Germany in 2018 was rather small. In comparison the number of small and micro-enterprises was higher. Nevertheless, the number of medium-sized companies was more than four times higher compared to large companies³¹³. Overall, medium-sized-companies, together with small companies are seen as a driver for innovation³¹⁴. Nevertheless, the analysis contains cases of companies of different sizes. Therefore, the characteristics of medium-sized companies need to be defined.

The European recommendation 2003/361 has defined the classification of companies according to their size. According to this recommendation, the size of a company is defined through the size of the staff and either their annual turnover or their balance sheet total³¹⁵. This leads to the following classification of medium-sized companies:

Category	Amount of staff	Annual turnover	Balance sheet total
Medium-sized	$50 \leq X < 250$	$10m < X \leq 50m$	$10m < X \leq 43m$

Table 1: Definition of Medium-sized companies according to the EU recommendation 2003/361³¹⁶

³¹¹ (Kirchem & Waack, 2021, p.4)

³¹² (Kirchem & Waack, 2021, p.43)

³¹³ (Kleine und mittlere Unternehmen (KMU) in Deutschland, 2020, p. 2)

³¹⁴ (Holátová & Březinová, 2013, p. 98)

³¹⁵ ("SME definition - Internal Market, Industry, Entrepreneurship and SMEs - European Commission", 2021)

³¹⁶ Table created by author based on ("SME definition - Internal Market, Industry, Entrepreneurship and SMEs - European Commission", 2021)

Within the literature, medium-sized companies are often analyzed in combination with small companies. Holátová and Březinová have investigated the characteristics of those companies concerning the companies' goals. According to their research, the goals of those companies are often influenced by the personal opinions of the management³¹⁷. Another finding was that the major focus of medium-sized companies is the generation and increase of profit. Further goals are following³¹⁸. Another characteristic of small and medium-sized companies are limited resources³¹⁹. Nevertheless, the size and structure of small and medium-sized companies might enable a higher flexibility³²⁰.

4.2 Visualization of the defined influencing aspects on marketing automation

The given definitions in the previous paragraphs have each dealt with a different aspect that are necessary to understand the potential of marketing automation. Nevertheless, the connection between those fields and their interdependencies became clear. The different fields can be influencing each other or be dependent on the other fields. The interdependencies shows that all of those fields can be merged into one integrated system. As a result, these connections should be included on a marketing automation system as well. To understand those connections better, they will be illustrated in the following figure. It needs to be mentioned, that the size of the shapes does not reflect the importance of each field. The aim is to highlight the categorization and the influences of each field on the others.

³¹⁷ (Holátová & Březinová, 2013, p. 100)

³¹⁸ (Holátová & Březinová, 2013, p. 101)

³¹⁹ (Characteristics Of The Small And Medium Enterprises Economics Essay, 2015)

³²⁰ (Characteristics Of The Small And Medium Enterprises Economics Essay, 2015)

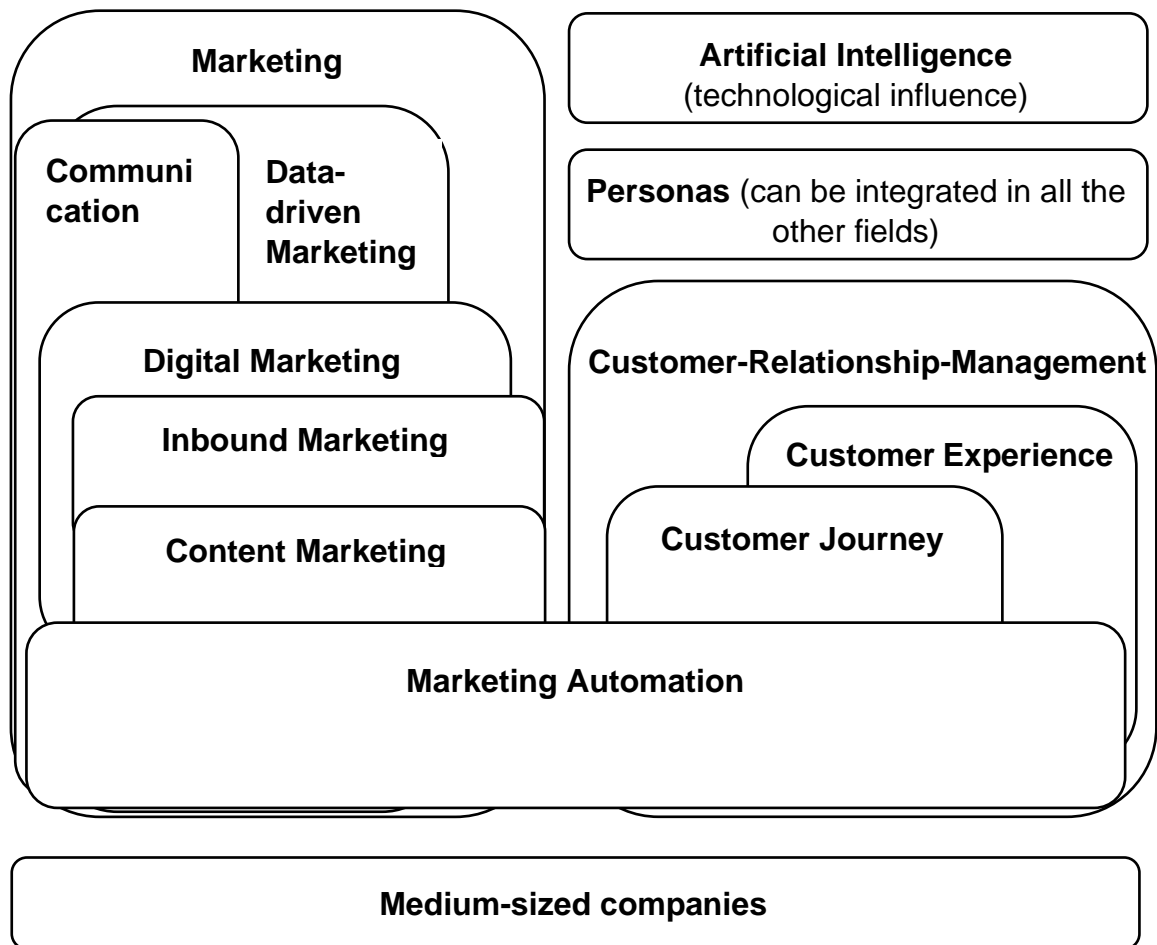


Figure 4: Visualization of the categorization of the defined aspects in chapter 4³²¹

5. Marketing Automation for international communication in practice

As shown in the previous definitions, a functioning marketing automation system requires different steps and components. Further, marketing automation can be included within several aspects of marketing activities. Nowadays, there are several service providers that offer software for the implementation of marketing automation systems³²². There are providers focusing on solutions for large companies and providers that are specialized on small and medium-sized companies. Some of those software products available, can be tailored to individual requirements to some extent. Nevertheless, the usage of specific

³²¹ Figure created by author based on the previous definitions

³²² (Vormelcher & Hoffmann, 2017, p. 137 f.)

software is not the only aspect when implementing such a system. As mentioned in the definition of marketing automation, the companies that want to use this instrument need to have clear goals and a defined strategy when choosing a provider³²³.

To assess how companies have dealt with the implementation, the following chapter of the thesis is delivering an analysis of some cases of marketing automation. The cases are about companies that have implemented or are planning to implement a marketing automation system. The cases fulfil to some extent the identified structure of a marketing automation system that is described in the following part.

The chapter is structured as follows. At first the structure of the marketing automation system that will be analyzed is introduced. Next, there will be a short introduction of the cases that are used for the analysis. The cases represent different companies from different fields and countries. The analyzed companies differ further in their size. As mentioned previously, the focus is on identifying how medium-sized companies can use marketing automation within their international communication effectively. By comparing cases from small, medium-sized, and large companies, it is possible to identify the similarities and differences. Aspects that appear in more than one case, are assumed to account for further companies as well.

The part following the introduction of the cases will be their analysis. The analysis will be done according to the structure of the marketing automation system. It will be shown which actions the different companies did within the several parts. This includes a comparison of the cases and the aim to identify the reasons for identified differences.

To support this assessment, the findings gained through the interviews with experts, will be included in this part. Their knowledge can be useful in explaining the differences between the cases. Furthermore, those findings might be helpful in identifying strengths and weaknesses of the cases and can potentially reveal further opportunities.

³²³ (Vormelcher & Hoffmann, 2017, p. 141)

5.1 Structure of the analyzed marketing automation system

The definitions of marketing automation and the affected fields showed that marketing automation has a great potential to be used for different tasks and processes. Within the following analysis, we follow the definition that marketing automation is a technology to automate marketing activities. This definition is quite open and enables the application within several use cases. This is important as the technology is not linked to a specific communication tool or channel in this definition.

Based on the insights gained through the literature research, five major steps and components that are necessary for a marketing automation system could be identified. These components can be merged into a general structure that includes the timeline of those steps. The further analysis of the thesis is therefore based on this defined structure of a marketing automation system that includes the identified necessary aspects. Every case that was chosen will be analyzed concerning the five steps. Those steps and components are shortly introduced in the following paragraph and will be defined in detail within the part of the analysis.

The identified structure of a marketing automation system:

Steps: There are several steps that are included in running a marketing automation system and that are necessary to reach the overall goals that companies aim to achieve through the usage of marketing automation. Those steps concern the operation of a marketing automation system. The scope of the different steps can further differ based on the preconditions of each company. The development of the concept and strategy that must be done in a previous step are not touched. The identified important components of marketing automation are:

Data collection: The collection of user data is the necessary basis to run the system effectively³²⁴. Data can be collected in different ways and should ideally be stored³²⁵.

Data analysis: The analysis of the collected data is as important as the collection itself. This step is necessary to understand the user's behavior as well as the user's needs³²⁶. This step is further the basis for the segmentation and the creation of

³²⁴ (Semerádová & Weinlich, 2020, p. 55)

³²⁵ (Heimbach et al., 2015, p. 131)

³²⁶ (Heimbach et al., 2015, p. 130)

personas. The steps of data collection and data analysis should be designed to go hand in hand. Only the combination of both parts can enable the next steps.

Segmentation & Personas: Segmentation is a key task for a company³²⁷. As a result of the data analysis, companies can create profiles of their customers. These profiles can then be used to segment the users and to create personas. As mentioned in the definition of personas, they represent typical customers of a company³²⁸. Using those personas and the created user segments enable personalization of content and the communication with the customers.

Content creation & channel selection: The creation of content is another essential step. In case of personalized content, there is the need to create variations to display them to the matching segment³²⁹. In addition to the creation of content, the companies need to define in which form and channels the content is going to be displayed.

Evaluation & improvement: The output and achievements of the system need to be reviewed and evaluated constantly to measure whether the goals are met. This is necessary to improve the system and detect potential needs for adaptations³³⁰.

These components are not only necessary for marketing automation. Those mentioned steps reflect partly the process of personalization that Kes has defined based on Adomavicius. This process starts with the understanding of the customer including the data collection and the building of profiles³³¹. The second part would be in the structure of this analysis the step of segmentation & the creation of personas. The next step in the process of personalization is the step of the creation and delivering of individualized content and offerings³³². In our case this part reflects the step of content creation and channel selection. The last step in the process of personalization is the aspect of measurement and adjustment³³³. That is mirroring the last step of the structure of the following analysis.

The overall structure of marketing automation as a process is visualized in the following figure.

³²⁷ (Dolnicar et al., 2018, p. 6)

³²⁸ (Miaskiewicz & Kozar, 2011, p.418)

³²⁹ (Interview 2: Content Marketing Manager, Appendix, p. 110)

³³⁰ (Heimbach et al., 2015, p. 130)

³³¹ (Kes, 2020 p. 45)

³³² (Kes, 2020 p. 45)

³³³ (Kes, 2020 p. 45)

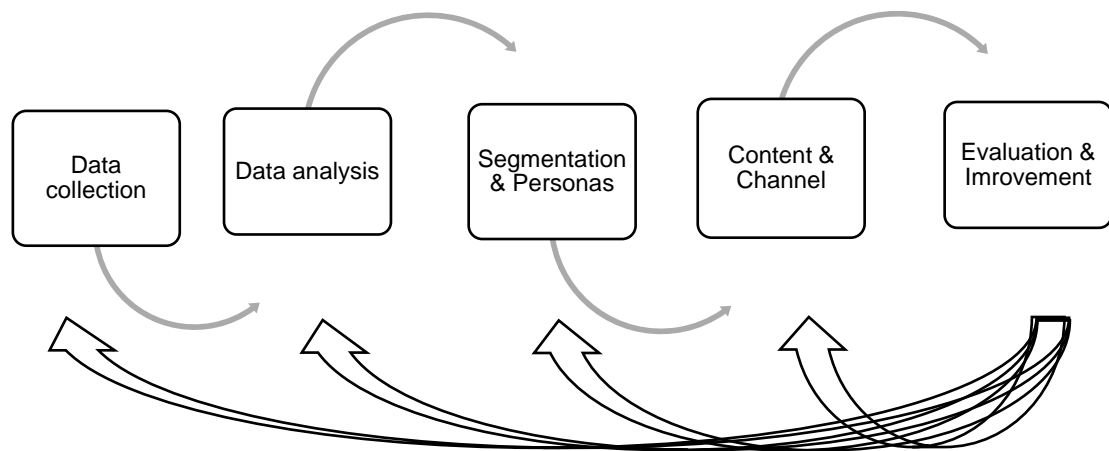


Figure 5: Identified Structure of Marketing Automation as a process³³⁴

The comparison of the structure of a marketing automation system and the steps within the process of personalization show many similarities. Therefore, this structure of marketing automation can be used for the delivery of individualized content.

The mentioned steps will be analyzed using the different case studies. Major questions in the following analysis are:

- What actions did the companies do to implement the marketing automation systems?
- What are the similarities between the cases?
- What are the differences between the cases?

5.2 Description of cases for the analysis

The previously defined structure of a marketing automation system is the basis for the analysis of the selected cases. The defined structure enables companies to deliver personalized content and messages. Therefore, the selected cases include the personalization either as a goal or as a tool within their marketing automation project. The cases and companies that were selected for the analysis are shortly described at first. This

³³⁴ Created by author based on the finding through the literature research

includes short information about the companies as well as their reasons and goals concerning the implementation of marketing automation. The following analysis of the cases is done based on the previously identified steps follows the description. Overall, the companies of the cases that were selected for the are quite diverse. As the research question is dealing with a wide view of marketing automation, the aim was to include different companies from different countries. The main criterion for the selection was the accessibility of information concerning the cases. Next, the selection of the cases was influenced by the question “how interesting are these cases”. The cases include a medium-sized Austrian company that is in the stage of implementation. The description and analysis of this case is mainly based on internal knowledge of the author. This company does not want to be mentioned using the name without a lock notice. Therefore, this company will be called Company A within this thesis. Next, there are two cases about large enterprises that are based in the US and that operate within the field of hardware and software products. One of those cases is quite old which makes it interesting as they started the project within the early stage of the development of marketing automation. Overall, within these two cases it is interesting to discover how software companies use the software-based innovation of marketing automation. The fourth case is then dealing with the case of a hotel group. This is an interesting case as the tourism industry has specific requirements. Next there is a case about a Norwegian company that has facilities in different countries and is operating worldwide. This international dimension is the interesting factor of this case. The sixth and final case does not deal with a classical company. This is the case of the election campaign of Barack Obama. Although the case is not about a company, it is still interesting as it shows the potential of marketing automation in communicating with targeted people.

5.2.1 Case 1: Company A: medium-sized company

The first case for the thesis is about an Austrian medium-sized company that is about to implement a marketing automation system. The company had a number of 150 employees and a total revenue of 44 million Euros in the business year of 2020 and is therefore a suitable representative of medium-sized companies³³⁵.

Currently, the company is in an early stage of the implementation process and has so far defined the necessary steps that need to be taken for the introduction³³⁶. Although the system is not yet introduced, it is still an appropriate case for the evaluation as the definition

³³⁵ (Interview 1: Head of digital innovation and IT of company A, Appendix p. 104)

³³⁶ (Interview 1: Head of digital innovation and IT of company A, Appendix p. 105)

of the analyzed parts already exist. This includes the definition of the strategic plan as well as the actions that need to be taken for the introduction³³⁷.

The overall goal for the implementation of a marketing automation system in this case is the creation of a personalized customer experience. This experience should then result in improved customer relationships and an increase of conversions³³⁸.

The company is targeting customers in Germany, Austria, Switzerland, northern Italy, and the Benelux countries. This requires communication in German and English and there is the potential that more languages need to be added in the future³³⁹. Therefore, the bilingual requirements need to be considered within the setup of their marketing automation system.

The company is assisted by a digital agency in the creation and implementation of their marketing automation system³⁴⁰. The agency is experienced in the introduction of marketing automation systems. This includes knowledge in project management, data collection, campaign management and content creation. This knowledge was used in defining the plan for the implementation³⁴¹.

The company will not use a specific marketing automation software from one of the existing providers. Any necessary aspect will be directly developed into the content management system (CMS) Pimcore that the company is using³⁴². Therefore, the marketing automation system is completely individualized and tailored to the needs of the company³⁴³.

5.2.2 Case 2: McAfee

The second case that will be used for the following analysis represents how a large company is using marketing automation. This is the case of McAfee. McAfee is an international operating provider of cybersecurity software. The company created a net revenue of 2,9 billion US Dollars in 2020 that classifies the company as a large enterprise³⁴⁴.

The overall goal of the implementation of marketing automation at McAfee was to increase the number of “qualitative good leads” through personalized campaigns³⁴⁵. This goal

³³⁷ (Interview 1: Head of digital innovation and IT of company A, Appendix p. 105)

³³⁸ (Interview 1: Head of digital innovation and IT of company A, Appendix p. 105)

³³⁹ (Interview 1: Head of digital innovation and IT of company A, Appendix p. 104)

³⁴⁰ (Interview 5: Marketing Automation Project Manager of company A, Appendix, p. 117)

³⁴¹ (Interview 1: Head of digital innovation and IT of company A, Appendix p. 104)

³⁴² (Interview 1: Head of digital innovation and IT of company A, Appendix p. 105)

³⁴³ (Interview 5: Marketing Automation Project Manager of company A, Appendix, p. 119)

³⁴⁴ ("McAfee's Fourth Quarter Revenue Grows 14%, Powered by 23% Consumer Revenue Growth", 2021)

³⁴⁵ ("McAfee Increased Lead with Marketing Automation Strategy", n.d.)

included the necessity of aligning the departments of marketing and sales³⁴⁶. Within the literature review, the comment of Shane Redding mentioned that marketing automation can be helpful in aligning those two departments although there is little research about this topic³⁴⁷.

As the company is operating internationally, there is a need for multilingual communication. In addition, the customer base of McAfee is diverse. This includes private customers as well as businesses or public institutions³⁴⁸. This aspect adds another complexity to the communication as the customers need to be addressed in a different form with different content.

McAfee decided to use the Eloqua software for the implementation of their marketing automation system³⁴⁹. The marketing automation software from Oracle can be used for different purposes and can include them into one system. This includes campaign management, segmenting, or lead management³⁵⁰.

This case is especially interesting as the overall goal of this case was not to deliver personalized messages. In this case the personalization of the communication activities was used to improve the quality of the generated leads. Therefore, the communication activities were the tool to serve the primary goal.

The company started to use marketing automation in the region of North America and is using the system worldwide nowadays³⁵¹. This can be explained through the overall development of marketing automation as the usage of those systems is higher in the US or UK compared to for example Germany³⁵².

5.2.3 Case 3: Cisco

Another large enterprise that is using marketing automation is Cisco. Cisco is a worldwide operating company providing network products³⁵³. This includes hardware as well as software products³⁵⁴. Within its product portfolio Cisco offers further a software solution for

³⁴⁶ ("McAfee Increased Lead with Marketing Automation Strategy", n.d.)

³⁴⁷ (Redding, 2015)

³⁴⁸ ("About McAfee", 2021)

³⁴⁹ (Jackson, 2016)

³⁵⁰ ("Marketingautomation – Eloqua | Marketing | CX | Oracle Deutschland", n.d.)

³⁵¹ ("McAfee Increased Lead with Marketing Automation Strategy", n.d.)

³⁵² (Hannig, 2017, p. 3 f.)

³⁵³ ("Who is Cisco", n.d.)

³⁵⁴ ("Products, Solutions, and Services", n.d.)

customer experience management that includes Marketing Automation³⁵⁵. Being a user and a provider of marketing automation systems, Cisco can be characterized as highly experienced within this field. Therefore, this case can provide interesting learnings for any company including medium-sized companies.

The number of employees of Cisco exceeds the number of 77.000³⁵⁶. In addition, the revenue within the financial year of 2020 was 49.3 billion US Dollars³⁵⁷. Therefore, Cisco can clearly be defined as a large enterprise. The customer base of Cisco is diverse and includes businesses as well as institutions, governments, or service providers³⁵⁸. Like in the case of McAfee, different communication with the different target groups can be necessary.

Cisco started to use marketing automation at an early stage of the development of the instrument. In an interview that was published in 1999, the senior manager of internet marketing at Cisco at that time explained their approach of marketing automation. According to this interview, the company started to deal with the topic about one year before the interview took place. This means that the company started with marketing automation in 1998 which is quite early³⁵⁹. Consequently, Cisco can be considered to be one of the early adopters of marketing automation.

The implementation took place at a time when Cisco started to target small and medium-sized companies in addition to their large customer base of large enterprises. This addition in the customer base occurred changes in sales and marketing infrastructure, including the implementation of marketing automation. The change occurred further the need to increase their efficiency in understanding the markets and customers as well as analyzing their campaigns. The implementation of marketing automation should further increase the collaboration between the marketing, sales, and service departments³⁶⁰.

Their first focus was on the usage of marketing automation for promotion as their main pain points were identified within campaign management. Nevertheless, the company was aiming to include further aspects of their marketing activities in the system. The overall goal was to integrate all parts into one seamless system. This should additionally enable an easier flow of data³⁶¹.

Besides their focus on promotion activities, the company aimed to create continuous campaigns for customer relationship. This example highlights again the close connection

³⁵⁵ (Webex Experience Management Platform, n.d.)

³⁵⁶ ("Cisco Annual Report - 2020," 2020, p. 10)

³⁵⁷ ("Cisco Annual Report - 2020," 2020, p. 4)

³⁵⁸ ("Who is Cisco", n.d.)

³⁵⁹ (Stodder, 1999, p. 20)

³⁶⁰ (Stodder, 1999, p. 21 f.)

³⁶¹ (Stodder, 1999, p. 20)

between customer relationship management and marketing automation. Overall, the main goal is to build a strong customer relationship management. The increase of efficiency through the usage of marketing automation was only a secondary goal³⁶².

To improve their campaign management, Cisco has decided to use the Rubic's EMA system. One of the benefits of this software system was for Cisco that it is not one static system where Cisco need to adapt their processes to fit to the software. In contrary the software provided the parts and tool that Cisco could use to build their marketing processes. Nevertheless, Cisco has identified that they need to rebuild their processes³⁶³.

Although Cisco started to plan the usage of marketing automation already in 1998, the following analysis will show that the case has many similarities to the other cases. This shows that the key aspects of marketing automation have remained stable over time.

5.2.4 Case 4: Maybourne Hotel group

The Maybourne Hotel Group is based in the UK and is the owner of several luxurious hotels³⁶⁴. According to the apollo.io website, the number of employees of the Maybourne Hotel Group is below 200 and the revenue is 26 million Dollar³⁶⁵. Unfortunately, the website does not mention the year that these numbers account to. According to the previous definition of medium-sized companies, the Maybourne Hotel Group can be classified as a medium-sized company.

The hotel group decided to introduce a marketing automation system in the year of 2008. The implementation was done with the usage of the marketing automation software from the provider Neolane³⁶⁶.

The major goal of the company was to improve their customer relationships. This should be achieved through the delivery of individualized messages to their customers. With this approach, the relevancy of the messages for the receivers should be increased as well. The aim was to deliver messages that are truly tailored to the preferences of the customers³⁶⁷
³⁶⁸.

³⁶² (Stodder, 1999, p. 20 f.)

³⁶³ (Stodder, 1999, p. 21)

³⁶⁴ (About Us - Maybourne Hotel Group, n.d.)

³⁶⁵ (Maybourne Hotel Group - Overview, Competitors, and Employees, n.d.)

³⁶⁶ (Neolane | Maybourne Hotels Selects Neolane Marketing Software to Promote Claridge's, the Connaught and the Berkeley, 2008)

³⁶⁷ (Neolane | Maybourne Hotels Selects Neolane Marketing Software to Promote Claridge's, the Connaught and the Berkeley, 2008)

³⁶⁸ (Neolane marketing automation software chosen by maybourne hotel group, 2008)

5.2.5 Case 5: Kverneland

The Kverneland group is a Norwegian company that was founded in 1879³⁶⁹ ³⁷⁰. The company produces agricultural machines and services and sells them internationally³⁷¹. The company is further selling electronic solutions³⁷². The company is not only selling but also producing internationally with factories in eight different countries³⁷³. In 2020, the group had more than 2500 employees³⁷⁴.

Within its strategy, the company aims to tailor its marketing activities towards their customers³⁷⁵. The change within the communication strategy started with the establishment of an email marketing strategy in 2012³⁷⁶. This approach was seen as the base for further communication activities. The campaign was set up with the usage of the software Evalanche by SC-Networks³⁷⁷. In addition, the project was realized in cooperation with the company e-raumwerk³⁷⁸. The goal of the campaign was to deliver personalized information to customers and further stakeholders of the company through email³⁷⁹.

The overall strategy was based on four core principles that the campaign had to follow. Those principles were: customer driven, performance driven, value driven and quality driven³⁸⁰. These principles include that the company aims to improve their understanding of their customers. In addition, the customers should receive personalized communication³⁸¹.

The implementation of the marketing automation project included employees from different departments of the Kverneland group from an early stage on³⁸². Within the project, the content that is communicated by the company was identified as a key aspect³⁸³. In addition, the relevancy of the content for the receivers is crucial³⁸⁴.

In 2015, the marketing automation project was implemented within one product segment of the company at first³⁸⁵. This included the set-up of an automated online marketing campaign

³⁶⁹ (Köhler, 2017, p. 245)

³⁷⁰ ("About us", n.d.)

³⁷¹ (Köhler, 2017, p. 245)

³⁷² ("About us", n.d.)

³⁷³ ("About us", n.d.)

³⁷⁴ ("About us", n.d.)

³⁷⁵ (Köhler, 2017, p. 245 f.)

³⁷⁶ (Köhler, 2017, p. 246)

³⁷⁷ (Köhler, 2017, p. 246)

³⁷⁸ (Köhler, 2017, p. 247)

³⁷⁹ (Köhler, 2017, p. 246)

³⁸⁰ (Köhler, 2017, p. 246)

³⁸¹ (Köhler, 2017, p. 246)

³⁸² (Köhler, 2017, p. 247)

³⁸³ (Köhler, 2017, p. 247)

³⁸⁴ (Köhler, 2017, p. 247)

³⁸⁵ (Köhler, 2017, p. 248)

that was operated within several channels³⁸⁶. Some of the channels that were used for the campaign were the companies' website, emails, and Facebook³⁸⁷.

At the end of 2015, Kverneland decided to use the marketing automation campaign for further product categories as well³⁸⁸. In 2016, the company started to create content that was tailored to the personas that were created within the project³⁸⁹. The year after was used to execute campaigns that are tailored towards the personas³⁹⁰. The long-term goal of the company is to establish the marketing automation process for the lead management within the whole company³⁹¹.

5.2.6 Case 5: Additional case: The election campaign of Barack Obama

To show the potentials of marketing automation, a case that is not implemented by a company is added to the analysis. This case will only play a minor role in the analysis as the focus on companies is the core. This case is the usage of marketing automation within the electoral campaign of Barack Obama. Marketing automation was used in both electoral campaigns of Barack Obama in 2008 and 2012³⁹².

This case can also be transferred to companies. The goal of the campaign was to build a loyal base of supportive voters and active participants of the campaign³⁹³³⁹⁴. Although voters are no customers in this sense, this campaign can be seen as a form of customer relationship management. It included winning new voters (customers), strengthen the relationship to existing voters (customers) and winning voters (customers) back.

³⁸⁶ (Köhler, 2017, p. 248)

³⁸⁷ (Köhler, 2017, p. 248)

³⁸⁸ (Köhler, 2017, p. 250)

³⁸⁹ (Köhler, 2017, p. 252)

³⁹⁰ (Köhler, 2017, p. 252)

³⁹¹ (Köhler, 2017, p. 252)

³⁹² (Scherer, 2016)

³⁹³ (Pack, 2010)

³⁹⁴ (Hall, 2013)

5.3 Analysis of the cases

The previously described companies used marketing automation for different overall goals. Nevertheless, the cases share similarities. The overall goal of company A is to create a customer experience that is defined through personalization. The overall goal of McAfee on the other hand was to improve the quality of their leads and to improve the collaboration between their marketing and sales departments. Again, personalized content was used to achieve the goal. Further goals were the improvements of customer relationships.

In the following part of the thesis, I will analyze how these companies used marketing automation in detail to reach their goals. To access their approaches in a structured way, the analysis follows the previously identified and described structure of a marketing automation system. In this way, it will be investigated which actions the companies took in the different steps. In addition, the steps will be described in detail first to show important aspects of those parts and to be able to understand the actions of the companies in the cases.

The starting point is the collection of data. After describing important aspects and influences within this step it will be described which data the companies used, where they collected the data and where the data is stored. The same procedure will be done for the following steps of data analysis, segmentation and creation of personas, creation of content and channel selection, and evaluation and improvement.

This observation of the actions is followed by describing the results that the companies were able to achieve through the usage of marketing automation.

The findings of this chapter result in a comparison of the cases that will be done in the following chapter of the discussion. As a result, conclusions will be drawn that account for medium sized companies.

5.3.1 Data collection

The data collection is an essential part for online marketing activities and is further the basis for any marketing automation system. This includes the collection of any information that a user leaves in the digital world and results in the so-called digital footprint³⁹⁵. Data collection can be done in different forms depending on the source where they are collected. A challenge concerning data collection are data protection laws as not all of the data available, can be used freely³⁹⁶.

A survey of Cluley, Green and Owen investigated the influence of new digital tools on the practice of marketing research. This research included the aspect of data collection or data gathering as they called it³⁹⁷. One of the benefits of digital data collection is that the data can be reported immediately or with few time lags. This enables consequently fast decision making and adaptations³⁹⁸.

Company A

As the customers that company A is targeting are in European countries, there are no major differences in the data protection laws. Concerning data collection, company A is relying mostly on data that they can collect themselves with the consent of the users according to the DSGVO regulation. This accounts especially for the automation and personalization that will take place on the companies' website or email campaigns. This includes data that is collected with the usage of tracking tool. Further data that is used, are information that the user is actively inserting when registering for an account on the website³⁹⁹.

In case that a user registers for an account he or she is delivering personal data that can be used for additional automated marketing activities. The users can further actively choose and edit fields of interest that will be provided for them⁴⁰⁰. In this way, the user can actively influence the segment which accounts for them and the content that they will receive. In case, that a user does not want to receive personalized content, they have the option to deactivate the collection of their data for this purpose

If the user does not register for an account, the personal data itself will be unknown for the company. In this case it is still possible to collect data like the pages that have been visited,

³⁹⁵ (Igor et al., 2019 p. 4)

³⁹⁶ (Igor et al., 2019 p. 4)

³⁹⁷ (Cluley et al., 2020)

³⁹⁸ (Cluley et al., 2020 p.33)

³⁹⁹ (Interview 1: Head of digital innovation and IT of company A, Appendix p. 107)

⁴⁰⁰ (Interview 5: Marketing Automation Project Manager of company A, Appendix, p. 117)

the time spent on the pages or the number of visits⁴⁰¹. These behavioral data will then be used for the next steps of the marketing automation system.

The major source for the collection of data is the company's website. Additional data, including customer information, comes from the company's ERP system⁴⁰². Overall, the main goal is to get the users of the website to register for a customer account.

Concerning search engine advertising campaigns, the company is working with Google algorithms. In this case data that is collected by Google is used to identify the user and display the matching advertisements. This requires further that Google needs to ensure that they are collecting data according to the laws⁴⁰³.

McAfee

The step of data collection was not one of the major pain points in the first implementation of the marketing automation system of McAfee. The reason was that McAfee was already able to gain a great number of Leads through their activities. The major pain point was the analysis of those leads and the relationship between the marketing and sales departments. Nevertheless, this existing database was the base for the overall system⁴⁰⁴.

The data collection in the case of McAfee was also done during the executed campaign. One of the outcomes of the first implementation was the creation of so-called experience portals. These portals enabled further collection of data that included the needs and requirements of the users⁴⁰⁵. The recipients of the personalized campaigns were tracked as well. The goal was to get information about the reactions to be able to evaluate the potential for conversions. As a result, McAfee was able to distinguish between leads with high potential to convert and leads with low potential of conversion. This enabled the company in a next step to focus only on the leads with high potential of converting sales⁴⁰⁶.

Cisco

Cisco understood the collection of data as the key aspect to increase their efficiency. In addition, the company realized, that they can use the gathered data to improve their knowledge. Their aim was to build a database to gain customer insights. This database will

⁴⁰¹ (Interview 1: Head of digital innovation and IT of company A, Appendix p. 107)

⁴⁰² (Interview 1: Head of digital innovation and IT of company A, Appendix p. 107)

⁴⁰³ (Interview 4: SEA Campaign Marketing Manager, Appendix, p. 116)

⁴⁰⁴ ("McAfee Increased Lead with Marketing Automation Strategy", n.d.)

⁴⁰⁵ ("McAfee Increased Lead with Marketing Automation Strategy", n.d.)

⁴⁰⁶ ("McAfee Increased Lead with Marketing Automation Strategy", n.d.)

include results from their campaign management system as well as further data. This further data can include sales data and service data⁴⁰⁷.

In addition, Cisco aimed to build a database for customers feedback, that includes feedback about the characteristics of their products. This database will enable the company to understand the features of the products that their customers want and need. Consequently, this data can be used for promotion and further activities within their marketing. In addition, Cisco collected information about responses towards their campaigns. That information will again be stored in their data base to improve future marketing purposes⁴⁰⁸.

A key challenge that was identified was based on the size of the company. The challenge was to merge all information from different databases into one integrated system. Based on the size, the company had several individual databases that needed to be merged to be able to use all information to build customer relationships⁴⁰⁹.

Maybourne Hotel group

Within the case of the Maybourne Hotel group, customer data is also an essential part for their marketing automation system. In this case existing historical data about the customers are used as well as new data. The data will be updated in real time for example when a new booking is done by a customer. In addition, behavioral data is collected at the companies' website. This includes information how customers navigate on the website⁴¹⁰.

Kverneland

Within the case of Kverneland, the data about the customers that were used for the campaign were taken from the companies' customer database and their CRM system⁴¹¹. This included information like email addresses of information whether the contact has already purchased a product from the company⁴¹². The data was an essential part within this case because of the companies' principle of being customer driven that included to gain knowledge about the customers' needs⁴¹³.

⁴⁰⁷ (Stodder, 1999, p. 21 f.)

⁴⁰⁸ (Stodder, 1999, p. 21)

⁴⁰⁹ (Stodder, 1999, p. 21 f.)

⁴¹⁰ (Neolane | Maybourne Hotels Selects Neolane Marketing Software to Promote Claridge's, the Connaught and the Berkeley, 2008)

⁴¹¹ (Köhler, 2017, p. 248)

⁴¹² (Köhler, 2017, p. 248)

⁴¹³ (Köhler, 2017, p. 246)

Election Campaign of Barack Obama

The data that was used within the marketing automation system of the election campaign of Barack Obama was collected on specific landing pages that included forms⁴¹⁴. This data was then stored in a database called Dashboard⁴¹⁵. Further, behavioral data on the website could have been tracked through the usage of a so-called tracking pixel⁴¹⁶. In addition, further data was collected through integrating further software like the email software Mailchimp⁴¹⁷.

Overall, it can be identified that the collection and usage of customer data is an essential aspect within all the cases. The differences within the approaches of the cases will be discussed within chapter six of the thesis.

5.3.2 Data Analysis

The aspect of data analysis goes hand in hand with the increasing importance of big data. The analysis of data is the necessary step following data collection. The analysis of the collected data enables companies to use the information for their purposes. Data that is not analyzed might not deliver a proper profile of the customers. Tools for the analysis of big data can be useful or possibly necessary for marketing automation systems. Those tools are created to analyze and structure enormous amounts of data to use them for different purposes⁴¹⁸. The usage and analysis of big data can enable individualized advertising and targeting of specific people⁴¹⁹.

Company A

In the case of Company A, the analysis of the data will be done automatically and is closely connected to the step of segmentation as the segmentation will be the result of the analyzed data. Therefore, the analyzed data is based on predefined triggers. Those triggers identify which user belongs to which segment⁴²⁰. The main goal that should be achieved through the analysis is to identify the user that is viewing the page. Further the needs and

⁴¹⁴ ("Marketing Automation Success," 2019)

⁴¹⁵ (Wesson, 2012)

⁴¹⁶ (Scherer, 2016)

⁴¹⁷ (Scherer, 2016)

⁴¹⁸ (Igor et al., 2019 p. 1)

⁴¹⁹ (Igor et al., 2019 p. 3)

⁴²⁰ (Interview 1: Head of digital innovation and IT of company A, Appendix p. 105)

preferences should be known or anticipated through analyzing behavioral data of the user⁴²¹.

McAfee

With the usage of the software, McAfee analyzed and segmented their leads. This approach helped the company to create improved profiles of their potential customers which resulted in improved segmenting⁴²². The company implemented a specific scoring system to analyze their leads. This scoring system enabled McAfee to evaluate the quality of their created leads. As the improvement of the quality of the leads was one of the main goals, the scoring system can be seen as one of the key elements⁴²³.

A challenge that McAfee was facing within their project was the format of the collected data. As the data that has been collected before the implementation of the marketing automation system was collected within different databases and countries, this data existed in different formats. This is a challenge that refers both to the data collection and data analysis stages. To use this data for the marketing automation system, the format of the data had to be standardized. The standardization of the data enables then the proper analysis. The task of standardization of the data was again automated. This was done using a specific integration that was provided by the company CRMT Digital⁴²⁴.

Cisco

The analysis of the previously centralized data was an important step in the case of Cisco as the company aimed to gain insights into their customers. Further, Cisco aimed to improve their understanding of their overall customer base as well as their customer segments⁴²⁵.

In addition, Cisco started to increase the analysis of customer behavior on their website. Additionally, trends were analyzed⁴²⁶.

⁴²¹ (Interview 1: Head of digital innovation and IT of company A, Appendix p. 107)

⁴²² (Jackson, 2016)

⁴²³ ("McAfee Increased Lead with Marketing Automation Strategy", n.d.)

⁴²⁴ ("McAfee", n.d.)

⁴²⁵ (Stodder, 1999, p. 21)

⁴²⁶ (Stodder, 1999, p. 22)

Maybourne Hotel Group

The data that is collected in the case of the Maybourne Hotel Group should be used to create a detailed profile of their customers that is updated automatically with each new interaction. These profiles should enable the company to identify the preferences of their customer and enable in a next step a personalized communication. Through the knowledge that is gained about the customers, the communication activities should become more relevant for the receivers⁴²⁷.

Kverneland

Within the Kverneland case, the company used a scoring system within their chosen software Evalanche. This scoring was closely connected to their personas. With the help of the scoring system, the users should be identified and classified as one of the defined personas⁴²⁸. As the company used data from their existing CRM and customer database, they already knew whether the contacts have already purchased a product⁴²⁹.

Election Campaign of Barack Obama

The collection and centralized storage of data enabled to create detailed profiles of the volunteers and supporters. This enabled the campaign team to use the knowledge about the contacts for their intended purposes⁴³⁰.

Like the step of data collection, data analysis was a part within every case. Additionally, the cases showed different approaches within their analysis. Those differences and similarities will again be discussed in chapter six.

⁴²⁷ (Neolane | Maybourne Hotels Selects Neolane Marketing Software to Promote Claridge's, the Connaught and the Berkeley, 2008)

⁴²⁸ (Köhler, 2017, p. 251 f.)

⁴²⁹ (Köhler, 2017, p. 248)

⁴³⁰ (Wesson, 2012)

5.3.3 Segmentation & Creation of Personas

Creating segments of customers is a key task within a companies' marketing activities⁴³¹. After analyzing the gathered data and knowing who the customers are, segmenting can help to create different strategies for different target groups⁴³². This does not only account for the communication strategy but also for the products, pricing and more. Segmenting can be done by using several attributes. This can be for example, by demographics, by habits or by the value that they have for the company⁴³³. Suitable attributes for segmentation can be identified through the analysis of data⁴³⁴.

Further, customers should be treated as the individuals with personalities that they are. Within this context it is helpful to create a persona as a representant for each segment. As shown in the previous definition of personas, a persona should not only be a list of attributes. It is a description of a person including occupation, hobbies, interests and more⁴³⁵. Having a person in mind when talking about a target group is helpful in personalizing the content for this segment.

Company A

In the case of Company A, the segmentation is again an automated process. Based on predefined conditions that are used within the step of data analysis, the users will be added to different segments that are targeted in a different way. An example of the predefined conditions is the number of visits of specific pages of the website. Users are placed in a specific segment depending on which pages they have visited. Further activities on the website like the download of information or the registration for the newsletter are additional preconditions for the allocation to a segment. An important aspect is that this allocation is never fixed. This means that a user can be placed in a different segment if the system recognizes a change in the behavior or in the pages visited⁴³⁶. The segments of company A are defined based on the product categories, the users interests and the users' behavior^{437 438}.

Although the segmentation is automated, the process of the creation of personas is still done without automatization in case of company A. The company has already defined

⁴³¹ (Dolnicar et al., 2018, p. 6)

⁴³² (Dolnicar et al., 2018, p. 11)

⁴³³ (Dolnicar et al., 2018, p. 6)

⁴³⁴ (Dolnicar et al., 2018, p. 11)

⁴³⁵ (Villani, 2018, p. 78 ff.)

⁴³⁶ (Interview 1: Head of digital innovation and IT of company A, Appendix p. 107)

⁴³⁷ (Interview 1: Head of digital innovation and IT of company A, Appendix p. 107)

⁴³⁸ (Interview 5: Marketing Automation Project Manager of company A, Appendix, p. 117)

personas before they intended to introduce a marketing automation system⁴³⁹. These personas will be used as a starting point. Based on previous research, company A already knows that not all of the personas can be used similarly for every country that they serve. Therefore, there is a need for adaptation that will be supported through the data that has been collected and analyzed in the previous steps.

McAfee

Segmentation was another key aspect in the marketing automation system of McAfee. Their scoring system that was mentioned in the aspect of data analysis, enabled McAfee to do a proper segmentation of their leads. This segmentation was further the basis for personalized campaigns⁴⁴⁰.

Cisco

Cisco has further used marketing automation for communication to target partner companies. Within this part, they used the Eloqua software by Oracle that enabled Cisco to do segmentation⁴⁴¹. The “Cisco Partner News Hub” that was created through the software included further the usage of Personas within the targeting activities⁴⁴².

Maybourne Hotel Group

As mentioned before, the Maybourne Hotel Group created profiles of their customers within their marketing automation system⁴⁴³. Within the researched sources, there we no information whether these profiles were used for further segmentation activities. In addition, there were no information whether personas were used within this case.

Kverneland

Segmentation and the creation of personas was an important aspect within the project of Kverneland. A key element of the marketing automation system was a landing page that

⁴³⁹ (Interview 1: Head of digital innovation and IT of company A, Appendix p. 105)

⁴⁴⁰ ("McAfee Increased Lead with Marketing Automation Strategy", n.d.)

⁴⁴¹ (Cisco, n.d.)

⁴⁴² (Cisco, n.d.)

⁴⁴³ (Neolane | Maybourne Hotels Selects Neolane Marketing Software to Promote Claridge's, the Connaught and the Berkeley, 2008)

was specifically created for this project. This page should be tailored individually to three target groups. Those target groups were classified as follows⁴⁴⁴.

1. Existing customers that have purchased a product of the chosen product category⁴⁴⁵
2. Existing customers that do not have purchased a product of the chosen product category⁴⁴⁶
3. Potential customers without an existing relationship with the company⁴⁴⁷

In a second step of the implementation of marketing automation at Kverneland, the company included a concept of personas to ensure the relevancy of the campaigns for the receivers⁴⁴⁸. Within this concept, the personas were not tied to the products of the company that they can be used within all product segments. This led to the creation of four personas. To be able to classify customers to a persona, the characteristics of the personas were measured using a metric and the scoring tool of the software⁴⁴⁹. The personas were used to develop content and campaigns that are tailored to the personas⁴⁵⁰.

Election Campaign of Barack Obama

The usage of marketing automation enabled the campaign team to do a segmentation of their supporters and volunteers. This could be done for example based on the regions of the supporters⁴⁵¹. The segmentation was further the basis for the creation of personalized content⁴⁵².

Overall, it was shown, that segmentation was a part in most of the cases. In contrast, the concept of personas was only used by a few cases. The only case where there were no information concerning segmentation and personas was the case of the Maybourne Hotel Group. The discussion of those findings will be delivered in chapter six.

⁴⁴⁴ (Köhler, 2017, p. 248)

⁴⁴⁵ (Köhler, 2017, p. 248)

⁴⁴⁶ (Köhler, 2017, p. 248)

⁴⁴⁷ (Köhler, 2017, p. 248)

⁴⁴⁸ (Köhler, 2017, p. 250 f.)

⁴⁴⁹ (Köhler, 2017, p. 250 f.)

⁴⁵⁰ (Köhler, 2017, p. 252)

⁴⁵¹ (Scherer, 2016)

⁴⁵² ("Marketing Automation Success," 2019)

5.3.4 Content Creation

As shown before, the creation of content is an important part within a companies' communication and within marketing automation systems⁴⁵³. The step of content creation is following the decision which messages the (possible) customers will receive. This decision is ideally connected with the next step, the definition of channels where the customer will receive the message. These two steps should be connected closely as they will how, where and in which form the communication with the customers will be⁴⁵⁴.

As mentioned earlier personalization within communication is becoming increasingly important and is included in most of the cases. This is one of the key challenges in the creation of content. Not every content needs to be individualized completely. In some cases, the content can be similar for similar customers⁴⁵⁵. Therefore, this content can be tailored for the previously defined segments and their personas. Full personalization like including the name into mails requires a lot of parameters as it is impossible to fill some parts manually for all customers⁴⁵⁶.

The task of content creation might become even more complex within international communication. Companies need to know their customers in any country that they are operating. Additionally, marketers need to be aware of the cultural, political, and social differences⁴⁵⁷. Those are influencing factors on the creation of content for those countries. The knowledge, how content need to be adapted in different countries is complex and more difficult to automate than only adapting the language. In this case, companies need to evaluate whether this aspect can be automated as well.

Company A

Company A is still creating the content for their channels manually. Although there is the potential to automate this process partly or fully, there are valid reasons for company A not to do so. The first ones are the content creators themselves. The content is not created by company A itself but by an external agency⁴⁵⁸. The content creators there are also part of the target group of Company A and they are enthusiastic about the product⁴⁵⁹. Therefore, they don't only have the technical knowledge what they have to write in which way, but they

⁴⁵³ (Interview 2: Content Marketing Manager, Appendix, p. 110)

⁴⁵⁴ (Kissel, 2019, p.6)

⁴⁵⁵ (Interview 2: Content Marketing Manager, Appendix, p. 110 f.)

⁴⁵⁶ (Interview 2: Content Marketing Manager, Appendix, p. 110)

⁴⁵⁷ (Tian, & Borges, 2011, p.111)

⁴⁵⁸ (Interview 5: Marketing Automation Project Manager of company A, Appendix, p. 118)

⁴⁵⁹ (Interview 1: Head of digital innovation and IT of company A, Appendix p. 107)

further have a good feeling for the target group. This personal feeling could potentially be lost in an automated content creation⁴⁶⁰.

McAfee

The case of McAfee has a higher complexity concerning their creation of content. The first aspect is that the company is targeting a variety of customers that require different content⁴⁶¹. As the company is operating worldwide, a higher complexity concerning languages and translation can be assumed. The company reduced this complexity as they used marketing automation at first only in the region of North America. Nevertheless, the system was rolled out to further regions over time which potentially led to changed requirements concerning language and translation.

In the case of McAfee, the individualized content was based on the created customer profiles and segments. One example of the personalization were individualized offerings. The sales staff used the knowledge about the customers to tailor offerings towards the customers' needs and requirements⁴⁶².

McAfee used individualized messages and further individualized content within several channels like email marketing or their so-called experience portals⁴⁶³. Those channels will be explained in more detail in the following paragraph. Nevertheless, this approach required the creation of content for those different channels that had to be individualized.

Another sort of personalization was done within so-called experience portals that McAfee created for their customers. Within these portals the users had access to personalized content that was not only offerings. This content was again tailored towards the customers' needs and was based on the results of the data analysis and customer profiles. Another part of these experience portals was the possibility to configure the products of McAfee that they suit the own requirements⁴⁶⁴. In this way, the users got a personalized experience and McAfee received information about the customers' needs.

⁴⁶⁰ (Interview 2: Content Marketing Manager, Appendix, p. 109)

⁴⁶¹ ("About McAfee", 2021)

⁴⁶² ("McAfee Increased Lead with Marketing Automation Strategy", n.d.)

⁴⁶³ ("McAfee Increased Lead with Marketing Automation Strategy", n.d.)

⁴⁶⁴ ("McAfee Increased Lead with Marketing Automation Strategy", n.d.)

Cisco

The aim of Cisco within their first implementation of marketing automation included to display relevant data and information to the customers when they are visiting the companies' website⁴⁶⁵.

The previously mentioned Cisco Partner News Hub included personalized content that was delivered to create individualized experiences. In addition, email campaigns were automated including personalized content. This included that the emails contained any information that the user subscribed to within the news hub. The content that was displayed was further tailored directly to the individual behavior of each user. This was done to increase the relevance of the content for the users. A vision at that time was the display of personalized content. This was a logical future step for Cisco⁴⁶⁶.

The tailoring of the content for the email campaigns was again enabled through the usage of the Eloqua software⁴⁶⁷.

Maybourne Hotel Group

The content that is used within the marketing automation project of the Maybourne Hotel Group is characterized through personalization. This means that the messages are tailored to match the previously created profiles of the customers. Information that are included in the personalized content are previous bookings that will be used to deliver suitable offerings⁴⁶⁸.

Kverneland

The creation of content was another important aspect within the implementation of marketing automation at Kverneland. As mentioned previously, the company created a specific landing page for the initial campaign. Within this page variations of content were displayed depending on the target group. The individualization of the content was done to increase the relevancy for the users⁴⁶⁹. Consequently, this approach required to create different content for the different target groups.

⁴⁶⁵ (Stodder, 1999, p. 22)

⁴⁶⁶ (Cisco, n.d.)

⁴⁶⁷ (Cisco, n.d.)

⁴⁶⁸ (Neolane | Maybourne Hotels Selects Neolane Marketing Software to Promote Claridge's, the Connaught and the Berkeley, 2008)

⁴⁶⁹ (Köhler, 2017, p. 248)

In a next step of the project in 2016, the company started to create content that was tailored to the created personas. The year after was used to execute campaigns that are tailored towards the personas⁴⁷⁰. This required again the creation of different parts of content.

Election Campaign of Barack Obama

Within the election campaign of Barack Obama, personalized content was used. Based on the collected data, the team was able to identify the needs and wishes of the voters. This knowledge was the used to create and send content to the voters that addressed their needs⁴⁷¹. Further, the landing pages that were used for the campaign were personalized⁴⁷².

As shown, the creation of content was again important within all cases. In addition, the content was personalized in most cases and was further envisioned in the other cases. The details will be discussed in chapter six.

5.3.5 Channel Selection

The selection of the channels where the individualized content is displayed is an essential task when using a marketing automation system for international communication. There are a lot of channels and communication tools available for a companies' communication. The selection of the channels will decide where the customers will see the content. In combination with the knowledge about the steps of the customer journey, the messages can not only be adapted to the customer but also to the step of the customer journey⁴⁷³. As mentioned in the previous paragraph, the selection of the channels should be closely connected with the step of content creation. In particular with the decision which content is going to be created.

As mentioned before, marketing automation can be used for a variety of applications. Considering communication, the following channels and communication tools were identified in the cases.

⁴⁷⁰ (Köhler, 2017, p. 252)

⁴⁷¹ (Scherer, 2016)

⁴⁷² ("Marketing Automation Success," 2019)

⁴⁷³ (Interview 2: Content Marketing Manager, Appendix, p. 109)

5.3.5.1 E-Mail Marketing

Email marketing is one part of online marketing that has been established as a standard tool and is further a form of direct marketing⁴⁷⁴. One reason is that email marketing is effective in its profitability⁴⁷⁵. The tool is used by companies that sell to other companies as well as by companies that sell to end-customers⁴⁷⁶.

The development of email marketing started within the 90ies and was empowered through the increased spreading and usage of emails. Nowadays there are several providers for software that can be used for email marketing⁴⁷⁷.

Email marketing enables companies to target certain customers with a message in a direct way⁴⁷⁸. Within this approach, a company sends emails that include (personalized) content with the aim to guide the reader to a website or a specific landing page⁴⁷⁹. Such emails can further include advertisings. In addition, some email campaigns include coupons⁴⁸⁰. Email marketing can be done in different formats. These are for example email campaigns or Newsletter⁴⁸¹.

Email marketing requires interesting and relevant content⁴⁸². This includes that the email marketing should deliver value for the reader. In addition, the efficiency of email marketing can be increased through tailoring the content towards the targeted reader⁴⁸³.

Email marketing can be done in different steps of a customer journey. This includes the acquisition of new customers or the improvement of customer retention⁴⁸⁴. Moreover, Email marketing can be a part of a marketing automation system⁴⁸⁵. Within the following paragraphs, it is shown how the case companies used email marketing within their marketing automation system.

E-Mail marketing is probably one of the most popular applications for marketing automation. E-mails are sent automatically to customers based on predefined triggers.

A major challenge here is that the E-Mails sent do not become too much. Customers can value a personal message via E-Mail, but it can turn into a negative experience if they

⁴⁷⁴ (Lammenett, 2021, p. 81 f.)

⁴⁷⁵ (Hartemo, 2016, p. 212)

⁴⁷⁶ (Zhang et al., 2017, p.851)

⁴⁷⁷ (Gunelius, 2018, p. 15)

⁴⁷⁸ (Hanna et al., 2015, p.2)

⁴⁷⁹ (Lammenett, 2021, p. 82)

⁴⁸⁰ (Lammenett, 2021, p. 83)

⁴⁸¹ (Lammenett, 2021, p.84 ff.)

⁴⁸² (Lammenett, 2021, p. 102)

⁴⁸³ (Lammenett, 2021, p. 103)

⁴⁸⁴ (Lammenett, 2021, p. 102)

⁴⁸⁵ (Gunelius, 2018, p.22)

receive a mail for everything that they do on a companies' website. This could make the receivers feel uncomfortable as they could ask themselves how much the companies' know about them⁴⁸⁶.

Company A

Company A is planning to use more automated E-Mail marketing through the marketing automation system and has defined some triggers. An example for those planned automated E-Mails are birthday Mails⁴⁸⁷. In case that a customer has registered an account where he specified the birthdate and accepted to be contacted, he can receive a "Happy Birthday" Mail. Within this Email the customer can be addressed personally, and they can further receive "goodies" or discounts that can help to strengthen the customer relationship.

McAfee

McAfee used email marketing as a communication tool to communicate individualized content. Within these email campaigns, content was selected that matched the individual customers' journey. This approach required the creation of individualized messages and further individualized content. Then, the content that was matching the specific user was merged into a personalized email. The selection of the matching content in this case was done through predefined triggers. These triggers were placed within the whole customer journey⁴⁸⁸.

Cisco

Cisco aimed to use marketing automation for their overall campaign management as well as for email marketing campaigns. Their plan for email marketing was as follows. At first send out a general email campaign. Based on the responses to this campaign, the company can react appropriately to the response⁴⁸⁹.

Maybourne Hotel Group

The Maybourne Hotel Group is using marketing automation to deliver personalized email marketing campaigns. These Emails will be sent to their customers and include

⁴⁸⁶ (Interview 2: Content Marketing Manager, Appendix, p. 110 f.)

⁴⁸⁷ (Interview 1: Head of digital innovation and IT of company A, Appendix p. 106)

⁴⁸⁸ ("McAfee Increased Lead with Marketing Automation Strategy", n.d.)

⁴⁸⁹ (Stodder, 1999, p. 22)

individualized offerings and further individual content that was previously created based on the customer profiles⁴⁹⁰.

Kverneland

Email marketing was also a part within the marketing automation system of Kverneland. Within the first implementation emails were sent to approximately 3500 receivers. The goal was to lead the receivers to the landing page that was created specifically for this purpose⁴⁹¹. On this page, the users could fill in a form to receive further information. This information was again sent via email⁴⁹².

Election Campaign of Barack Obama

During the election campaign, emails were used as a form of communication. Based on the collected information about the voters, they could be addressed with personalized messages⁴⁹³.

As shown, emails were a communication tool within every case. The selection of the different channels will be provided in chapter six.

⁴⁹⁰ (Neolane | Maybourne Hotels Selects Neolane Marketing Software to Promote Claridge's, the Connaught and the Berkeley, 2008)

⁴⁹¹ (Köhler, 2017, p. 248)

⁴⁹² (Köhler, 2017, p. 250)

⁴⁹³ (Scherer, 2016)

5.3.5.2 Newsletter Marketing

Newsletter marketing is one tool within the field of email marketing⁴⁹⁴. They are further perceived to be an effective communication tool⁴⁹⁵. Newsletter aim to deliver news and further information to its recipients. They are further dispatched within a regular frequency. This is one aspect that differentiates newsletters from further email campaigns⁴⁹⁶.

Newsletters can be used to increase customer retention as they can deliver relevant content to existing customers⁴⁹⁷. Further newsletter can be useful within the acquiring process or for branding campaigns⁴⁹⁸.

Another special aspect of newsletters is, that they can only be delivered to users that have opted in to receive them⁴⁹⁹. In addition, there is the necessity to give the users the possibility to opt-out⁵⁰⁰. The collection of receivers is mostly done through registration forms on the companies' website or within a purchase checkout process⁵⁰¹.

Like other marketing activities, newsletter marketing can nowadays be done through the usage of specific software⁵⁰².

Automated newsletter marketing has some similarities to automated e-mail marketing but is still a different case. Within Newsletter marketing, users can register to receive a companies' Newsletter on a regular basis. There is always the necessity that users can opt-out again.

Company A

In case of company A, the users can specify their interest when opting in for the newsletter⁵⁰³. If they do not specify their interests, the standard newsletter will be sent. If the users specify their interests, the standard newsletter will be used as a basis and will be added with the content that could match the user's interests. This newsletter approach requires a high amount of content that needs to be created regularly⁵⁰⁴.

⁴⁹⁴ (Mayer, 2019, p. 258)

⁴⁹⁵ (MarketingProfs: Marketing opinions - MarketingProfs daily fix: How to craft an email newsletter that gets marketing results 2018, p. 1)

⁴⁹⁶ (Mayer, 2019, p. 258)

⁴⁹⁷ (Mayer, 2019, p. 260)

⁴⁹⁸ (Mayer, 2019, p. 259 f.)

⁴⁹⁹ (Mayer, 2019, p. 258)

⁵⁰⁰ (Mayer, 2019, p. 267)

⁵⁰¹ (Mayer, 2019, p. 261)

⁵⁰² (Mayer, 2019, p. 280 f.)

⁵⁰³ (Interview 1: Head of digital innovation and IT of company A, Appendix p. 106)

⁵⁰⁴ (Interview 5: Marketing Automation Project Manager of company A, Appendix, p. 118)

McAfee

As mentioned before, McAfee used marketing automation to deliver personalized mailings⁵⁰⁵. Nevertheless, within the research of this case, there were no information whether these mailings were additionally sent in the format of a newsletter.

Cisco

As mentioned previously, Cisco has created a specific news hub to reach their partner companies. This was closely connected to email marketing as the users could subscribe to content within the hub to receive emails about these topics⁵⁰⁶.

Maybourne Hotel Group

The Maybourne Hotel Group is using email marketing as well⁵⁰⁷. Nevertheless, according to the information researched, the emails are used for personalized communication and not for Newsletter marketing.

Kverneland

Within the information that were accessed during the research of the Kverneland case, there were no information whether the company used marketing automation for newsletter marketing.

Election Campaign of Barack Obama

Within the sources that were accessed during the research of this case, there were no information whether the marketing automation system was used for newsletter marketing.

In contrast to email marketing, newsletter marketing was only done in few cases. This will again be discussed in chapter six.

⁵⁰⁵ ("The Rubicon Agency - Increasing opportunities through improved UX", 2021)

⁵⁰⁶ (Cisco, n.d.)

⁵⁰⁷ (Neolane | Maybourne Hotels Selects Neolane Marketing Software to Promote Claridge's, the Connaught and the Berkeley, 2008)

5.3.5.3 Website

A companies' website is an important channel for communication. This is because information about products, the company itself or content about connected topics can be displayed within this channel⁵⁰⁸.

Automated personalization can also be done on websites. Like the personalization within further channels or communication tools, this personalization is based on collected data of the users. Within this channel, the different content parts of the website can be composed individually to meet the identified interests and needs of the user⁵⁰⁹. One example of on-page personalization are product recommendations that are displayed based on the browsing behavior of the users⁵¹⁰. Nevertheless, a website as well as a personalized website needs to be user friendly to be efficient. This is because the usability can influence the user's behavior⁵¹¹.

Company A

Company A is planning to use on-page personalization in different forms. In this case, the user can disable the individualized content at any time and any place where the individualized content is displayed⁵¹². This approach should increase the transparency for the users as they can decide whether they want individualized content or not. This should further increase the trust of the users towards the company. The on-page personalization in this case is based on the users' behavior on the site as well as on the data that they delivered in the accounts.

One example is that recommended content is highlighted on the site based on the pages that have been visited previously. Another on-page personalization in case of company A is the highlighting of events that are close to the user. This is only possible if the users have an account where they have specified their post code information. This data is then used to detect the closest events or dealer to highlight them for the user individually.

⁵⁰⁸ (Schäfer & Kummer, 2013, p. 7571)

⁵⁰⁹ (Ferretti et al., 2016, p. 157)

⁵¹⁰ (Ferretti et al., 2016, p. 158)

⁵¹¹ (Belanche et al., 2012, p. 124)

⁵¹² (Interview 1: Head of digital innovation and IT of company A, Appendix p. 106)

McAfee

Within the case of McAfee, the company created experience portals⁵¹³. It was not mentioned whether these portals were included in the companies' website or whether they were independent from the website.

Cisco

Within the interview about the first implementation of marketing automation at Cisco, the delivery of personalized content at the companies' website was mentioned. At the time of the first implementation, this was a vision for the future⁵¹⁴. This means that this aspect was not included in the first implementation. Nevertheless, as this interview was published 22 years ago, there is a great potential that Cisco has included personalized content at the website in the meantime.

Maybourne Hotel Group

Within the research about the case of the Maybourne Hotel group, there was no information whether marketing automation was used within their website (except of the collection of data)⁵¹⁵.

Kverneland

The Kverneland website was included in the first campaign of the marketing automation project. The goal within this channel was again to lead the users to the landing page of the campaign⁵¹⁶.

Election Campaign of Barack Obama

The personalized landing pages that were specifically designed for the electoral campaign were one of the key elements of the marketing automation campaign. These pages collected forms through which data about the sources could be collected^{517 518}.

⁵¹³ ("McAfee Increased Lead with Marketing Automation Strategy", n.d.)

⁵¹⁴ (Stodder, 1999, p. 22)

⁵¹⁵ (Neolane | Maybourne Hotels Selects Neolane Marketing Software to Promote Claridge's, the Connaught and the Berkeley, 2008)

⁵¹⁶ (Köhler, 2017, p. 248)

⁵¹⁷ (Scherer, 2016)

⁵¹⁸ ("Marketing Automation Success," 2019)

Within the channel of the companies' website, there were several differences within the cases. This will again be covered in the discussion concerning the selection of channels in chapter six.

5.3.5.4 Retargeting

Retargeting is one tool within online communication and advertising. It further belongs to the field of behavioral advertising⁵¹⁹. Retargeting is based on the data of the browser history of users⁵²⁰. These data can be collected through the usage of so-called cookies or further tracking tools⁵²¹. This information is then used to display individualized advertisements to the users⁵²². Consequently, retargeting is categorized within the field of personalization⁵²³. These ads can be displayed within other sources and channels than the own corporate website⁵²⁴.

An example of retargeting is the display of products that have been seen by the individual user on the companies' website earlier⁵²⁵. This form of communication aims to persuade the users to visit the website again⁵²⁶. Further, retargeting can be used on the companies' website as well. This can be done for example by displaying the content that the user saw on the last page visit⁵²⁷.

The aim of retargeting ads is to be more relevant for customers compared to other advertisements and consequently retargeting should be more effective⁵²⁸. The effectiveness of retargeting is not only determined by the personalization of the displayed content. Further influencing factors are the time when the ad is displayed and the channel where the ad is displayed⁵²⁹. This includes the stage of the customers' journey. The research of Bleier & Eisenbeiss for example identified that the effectiveness of retargeting ads is higher within an early stage of the customer journey⁵³⁰.

⁵¹⁹ (Kes, 2020, p. XI)

⁵²⁰ (Lambrecht & Tucker, 2013, p. 561)

⁵²¹ (Kes, 2020, p. 49 f.)

⁵²² (Lambrecht & Tucker, 2013, p. 561)

⁵²³ (Kes, 2020, p. 43)

⁵²⁴ (Lambrecht & Tucker, 2013, p. 561)

⁵²⁵ (Lambrecht & Tucker, 2013, p. 561)

⁵²⁶ (Kes, 2020, p. 41)

⁵²⁷ (Lambrecht & Tucker, 2013, p. 561)

⁵²⁸ (Bleier & Eisenbeiss, 2015, p. 669)

⁵²⁹ (Bleier & Eisenbeiss, 2015, p. 670)

⁵³⁰ (Bleier & Eisenbeiss, 2015, p. 686)

Retargeting can be identified as one form of behavioral advertising and is further part of digital data driven marketing.

Retargeting can evoke positive and negative reactions of a user. A positive aspect is that ads using retargeting reflect the interest of a user and can therefore trigger a higher click rate. On the other hand, users and customers can become annoyed and reject the ad once they realize that their behavior is tracked⁵³¹.

As retargeting includes forms of communication that depends on data, it can be used within marketing automation systems.

Company A

Company A is aiming to use personalized retargeting especially in case of interrupted checkout processes. This is the case when a user is for example placing goods on the cart but does not finish the buying process. The goal of those retargeting campaigns is to guide the user back to the companies' website and to generate conversions⁵³².

McAfee

Within the case of McAfee, follow-up mailings were used for communication⁵³³. There was no information whether the company used retargeting as defined as well.

Cisco

Within the information that were researched concerning the case of Cisco, there was no information whether the automation should be used for retargeting as well. Nevertheless, banner ads were mentioned as a communication tool⁵³⁴. These ads have the potential to be used for retargeting purposes.

⁵³¹ (Kes, 2020 p. 53 ff.)

⁵³² (Interview 1: Head of digital innovation and IT of company A, Appendix p. 106)

⁵³³ ("McAfee Increased Lead with Marketing Automation Strategy", n.d.)

⁵³⁴ (Stodder, D. 1999, p. 21)

Maybourne Hotel Group

Within the sources that were accessed during the research of the case of the Maybourne Hotel Group, there was no information whether the automation should be used for retargeting as well.

Kverneland

Within the Kverneland case, there were no information whether the marketing automation system was used for retargeting as defined.

Election Campaign of Barack Obama

One of the sources that was accessed during the research mentioned that retargeting was enabled through the marketing automation system in the case of the electoral campaign of Obama⁵³⁵. Nevertheless, it was not mentioned how the retargeting was done in detail.

Interestingly, within the cases there were not many information whether the companies used marketing automation for retargeting purposes. This is interesting as marketing automation can be identified as a suitable tool for retargeting based on the definitions of marketing automation and retargeting.

5.3.5.5 Further Channels

Besides the previously described channels, there are further channels in which marketing automation can be used. As shown in the definition of marketing automation this can include further digital channels as well as offline channels. Within the following paragraphs, it will be described which further channels were included in the marketing automation projects of the different cases.

⁵³⁵ (Scherer, 2016)

Company A

In the current stage of the project of company A, it is not planned to use marketing automation in further channels. Nevertheless, there is the potential that further channels will be added in the future. This depends on the performance of the first implementation. An automation that is already established is used within every SEA campaign as the responsible SEA Campaign manager mentioned within the interview⁵³⁶.

McAfee

The created experience portals can be seen as an additional channel as they were specifically designed within the marketing automation project⁵³⁷. There was no information whether McAfee used marketing automation in further channels like social media accounts.

Cisco

Within the interview concerning the first implementation of marketing automation, the manager of internet marketing of Cisco talked also about banner ads as a piece of their marketing automation⁵³⁸. This was within the context explaining their email marketing strategy. Nevertheless, there is the potential to use banner ads within further channels as well.

Maybourne Hotel Group

The Maybourne Hotel Group is using marketing automation for communication in an offline channel as well. This is done in the form of direct mails. Within these mails, individualized offerings and messages, like in their email strategy, are sent to their customers⁵³⁹.

Kverneland

Kverneland used several channels within their first marketing automation campaign. Besides the previously mentioned emails and website, the company used further channels

⁵³⁶ (Interview 4: SEA Campaign marketing manager, Appendix, p. 114)

⁵³⁷ ("The Rubicon Agency - Increasing opportunities through improved UX", 2021)

⁵³⁸ (Stodder, D. 1999, p. 21)

⁵³⁹ (Neolane | Maybourne Hotels Selects Neolane Marketing Software to Promote Claridge's, the Connaught and the Berkeley, 2008)

like Facebook, printed advertisements and more. Within all of the channels, the goal was to direct the receivers to the created landing page⁵⁴⁰.

Election Campaign of Barack Obama

During the research, there were no information whether further channels were included in the marketing automation system of the electoral campaign of Barack Obama.

The usage of further channels differed between the cases. Interestingly, offline channels were also used in some cases. This will also be included into the discussion concerning the selection of channels in chapter six.

5.3.6 Evaluation & Improvement

It is not enough to establish a marketing automation system once. As the customers and the regulations can change, there is a need to monitor these developments. Consequently, the marketing automation system needs to be adapted as well. This can affect all of the steps discussed before.

Evaluation of the effectiveness of campaigns can further be done through the usage A/B-testing. Within this approach two mostly similar content pieces with one differentiation are shown to different customers of the target group to identify which one is more effective⁵⁴¹.

Company A

So far, there are no information concerning the evaluation and improvement of the marketing automation system of company A. This is because the company has not yet implemented the system completely. Nevertheless, there will be the necessity to observe the effectivity of the system once it is implemented.

⁵⁴⁰ (Köhler, 2017, p. 248)

⁵⁴¹ ("A/B-Tests Definition | OnlineMarketing.de Lexikon," n.d.)

McAfee

The case of McAfee highlighted the need to evaluate and improve the system over time. Within this case, the company has switched the software that was used for their marketing automation system several times. They started the project with the usage of Eloqua and changed over time to Salesforce Pardot^{542 543}. Additionally, the Adobe Campaign Manager was used⁵⁴⁴. The reason for this change was the defined goal of the alignment of their marketing and sales departments. Even though the company reported improvements within the alignment, they identified the potential for additional improvements. The reason was that the two departments still used different software for their processes. This fact occurred difficulties within the collaboration of the two departments. The solution for this problem was to migrate their marketing automation system into the software that was used within their sales department. This software was Salesforce Pardot. This was a reasonable decision as this software offers the potential to include marketing automation. As a result, the usage of the same software might decrease the still existing difficulties within the processes between the marketing and the sales department. In addition, this decision has the potential to improve the alignment between the two departments even more. Overall, this decision can help the company to leverage synergies and improve the flow of data⁵⁴⁵.

Cisco

At the time that Cisco started with the implementation of marketing automation, the company was already aware of the need of adaptation of the system. In addition, they realized that online marketing requires fast decision making. The need for adaptation further occurred because Cisco implemented the marketing automation step by step. The steps were to first build the data storage. Next, the ecommerce module should have been introduced for their online communication⁵⁴⁶.

Maybourne Hotel Group

Within the sources that were accessed during the research of this case, there were no information about evaluation and improvement activities concerning the implemented marketing automation system.

⁵⁴² ("McAfee Increased Lead with Marketing Automation Strategy", n.d.)

⁵⁴³ (McAfee Aims for Sales and Marketing Alignment with Salesforce Pardot, 2021)

⁵⁴⁴ (McAfee Aims for Sales and Marketing Alignment with Salesforce Pardot, 2021)

⁵⁴⁵ (du Preez, 2021)

⁵⁴⁶ (Stodder, 1999, p. 22)

Kverneland

Kverneland used a pilot project to test marketing automation within one product segment⁵⁴⁷. Consequently, the performance of the pilot was evaluated before the marketing automation system was expanded for further product segments. Further, the responses of the receivers of the campaign should have been monitored⁵⁴⁸.

Election Campaign of Barack Obama

Within the electoral campaign of Barack Obama split testing was used to improve the landing pages of the campaign⁵⁴⁹. Besides this technique, there were no further information about other evaluation or improvement activities.

Evaluating and improving newly implemented tools and software seem to be reasonable tasks. Interestingly, there were only few information concerning this task.

5.3.7 Results of the cases

Most of the cases have reported impressive results and improvements concerning several key performance indicators (KPIs). Those results will be described in the following paragraphs. Further, those results will be analyzed whether they match the previously described goals of the cases. As company A has not implemented the system yet, there are no results reported.

McAfee

The case of McAfee resulted in great achievements as the company was able to reach several of their predefined goals. One of their goals was the improvement of the quality of their leads. Although the company reported a drop in their overall number of leads, they reported that the number of qualitative leads was increasing. This resulted further in an increasing conversion rate. A second goal of McAfee that should have been achieved through the usage of marketing automation was the alignment of the marketing and the sales departments. According to McAfee the connection between those departments was

⁵⁴⁷ (Köhler, 2017, p. 248)

⁵⁴⁸ (Köhler, 2017, p. 250)

⁵⁴⁹ (Scherer, 2016)

improved through the implementation of marketing automation. This accounted especially for their lead management⁵⁵⁰. This result is justifying the hypotheses of Shane Redding that states that marketing automation can be a helpful tool in the alignment of the marketing and sales departments⁵⁵¹.

Cisco

In the case of Cisco, an increase of the effectivity of the email marketing campaigns were reported. This included for example an increase of the click through rate that was achieved through the emails. Further, the company reported an increase of the engagement within their news hub⁵⁵².

Maybourne Hotel Group

Within the sources that were accessed within the research of this case, there were no information about results that could be achieved through the usage of marketing automation.

Kverneland

The sources that were accessed during the research concerning the case of Kverneland, did not mention whether the usage of marketing automation increased KPIs of the company. Nevertheless, as the company expanded the usage of marketing automation within all of their product segments, it can be assumed that the pilot project delivered satisfying results.

Election Campaign of Barack Obama

Within the sources that were researched concerning the case of the electoral campaign, there were no information how KPIs performed. Nevertheless, it is known that Barack Obama has won both elections. Therefore, it can be assumed that the usage of marketing automation helped to achieve this goal.

⁵⁵⁰ ("McAfee Increased Lead with Marketing Automation Strategy", n.d.)

⁵⁵¹ (Redding, 2015)

⁵⁵² (Cisco, n.d.)

Overall, the results that could be achieved within these cases, show that marketing automation can have a positive impact for companies. This can further help companies that aim to implement marketing automation in deciding whether they want to use this instrument.

6. Discussion

Within the previous paragraphs, it was shown how the chosen cases used their marketing automation systems and which activities were taken within the identified components. Describing the usage and the activities' within the identified components is not sufficient to answer the research question of this thesis. Therefore, those previous findings will be compared and discussed in the following paragraphs. This comparison enables to draw conclusions that can ideally result in managerial implications for medium-sized companies. In addition, potentials for further research can be identified.

The discussion follows again the previously identified structure of a marketing automation system. This means, that the actions within the different steps are discussed first, followed by a discussion of the overall strategy.

6.1 Data collection

As the description of the actions that were taken within the cases showed, each of the companies used data and information about their contacts within their marketing automation systems.

Overall, two major challenges within the component of data collection could have been identified. The first one is the data collection itself. The analyzed companies did this aspect in different forms. One form was the collection of data on the website through the usage of so-called landing pages and registration forms where the user actively inserted their data. This form can be appropriate for any company. In case that the user actively insert their data and agree in the processing of the data, it is easier for companies to use those data. This is due to the data protection regulations.

Another form of data collection on the website was the usage of tracking tools to track the users' behavior on the web. This approach was planned or done for example in the cases

of company A, the Maybourne Hotel Group, or the electoral campaign of Barack Obama⁵⁵³
⁵⁵⁴ ⁵⁵⁵ ⁵⁵⁶. Within the usage of tracking tools, it is important that this usage follows the regulations concerning the data protection.

Further sources that have delivered data for the projects were existing databases of the companies like CRM or ERP databases. These were sources for example in the cases of the Maybourne Hotel Group or Kverneland⁵⁵⁷ ⁵⁵⁸. These databases can deliver great insights about existing customers and contacts. Nevertheless, the usage of these databases within the marketing automation system requires a seamless integration. Additionally, the data has to be updated regularly.

The second challenge that could be identified through the cases was the integration of all customer data collected and each existing database that the companies already had into one integrated database. In the cases of the large companies McAfee and Cisco this was a major challenge. Due to their size and operations within different countries, these companies had already implemented several databases or software where they collected and stored customer data. In addition, the data could have had different formats within the different databases. This aspect complicated the integration into one system as the data needed to be standardized⁵⁵⁹ ⁵⁶⁰.

As this complexity was especially shown in the cases of large companies, there might be the opportunity that this second task is less complex for medium-sized companies. Because of the size and structure of medium-sized companies there is the potential that such companies do not have a fragmented structure in their databases. This aspect could simplify the integration of the existing databases into the marketing automation system. Nevertheless, this aspect is depending on the individual structure of each company. It cannot be generalized that there is less complexity for medium-sized. This is because there might be medium-sized companies as well that operate with more than one database and data in different formats.

Overall, the cases showed that the companies are aware of the importance of customers data for their marketing automation systems. Therefore, medium-sized companies that aim to implement a marketing automation system need to have this awareness. At first, it needs

⁵⁵³ (Interview 1: Head of digital innovation and IT of company A, Appendix p. 107)

⁵⁵⁴ (Neolane | Maybourne Hotels Selects Neolane Marketing Software to Promote Claridge's, the Connaught and the Berkeley, 2008)

⁵⁵⁵ ("Marketing Automation Success," 2019)

⁵⁵⁶ (Scherer, 2016)

⁵⁵⁷ (Neolane | Maybourne Hotels Selects Neolane Marketing Software to Promote Claridge's, the Connaught and the Berkeley, 2008)

⁵⁵⁸ (Köhler, 2017, p. 248)

⁵⁵⁹ ("McAfee Increased Lead with Marketing Automation Strategy", n.d.)

⁵⁶⁰ (Stodder, 1999, p. 21 f.)

to be identified where the company already collects data and where the data is currently stored.

In addition, they need to know where they can further collect data and how they can store it. This is an important information within the decision-making process. The integration of data is further a necessary aspect that need to be considered within the process of choosing a software solution for the marketing automation system.

6.2 Data analysis

As mentioned earlier, data is an important component for marketing automation. The cases showed that the awareness of this importance is a crucial part. Within the first step of their marketing automation systems, the companies collected the data and stored the data in databases. To use the data for the marketing automation system, an analysis of the data is necessary.

Within most of the cases, the analysis of the data included the creation of profiles of the customers. Within the case of McAfee, the profile creation was for example done through the usage of a scoring system^{561 562}. Kverneland also used a scoring system. In this case, the scoring was connected to the concept of personas⁵⁶³. Further, the profiling was also used in the cases of the Maybourne Hotel Group and the electoral campaign of Barack Obama^{564 565}.

The profiling of the customers was done in most of the analyzed cases. Consequently, it can be concluded that this is a suitable approach for companies that aim to implement marketing automation. The cases showed additionally that the used marketing automation software can do this profiling automatically. Further, this approach was observed within the cases of companies of different sized. Therefore, this can be a suitable approach for medium sized companies as well. As the cases showed that the software can do this step automatically, it can be easily used by medium-sized companies as this does not burden the limited resources of the companies.

⁵⁶¹ (Jackson, 2016)

⁵⁶² ("McAfee Increased Lead with Marketing Automation Strategy", n.d.)

⁵⁶³ (Köhler, 2017, p. 251 f.)

⁵⁶⁴ (Neolane | Maybourne Hotels Selects Neolane Marketing Software to Promote Claridge's, the Connaught and the Berkeley, 2008)

⁵⁶⁵ (Wesson, 2012)

As shown in the cases, the step of data analysis was further the necessary connection between the steps of data collection and segmentation.

6.3 Segmentation and creation of personas

Segmentation was an important aspect within most of the cases. Based on the collected and analyzed data, customers could be categorized within segments or target groups. This segmentation was mostly the necessary step to be able to create personalized content in a next step. Like the task of data analysis, the segmentation could be done automatically through the software^{566 567}.

In contrast, Personas were only used in the cases of Company A and Kverneland⁵⁶⁸. Kverneland explained the usage of Personas with the relevancy of the content for the receivers. This could be achieved through the usage of Personas⁵⁶⁹.

Consequently, it can be concluded that segmentation is an important step for marketing automation systems. This enables the companies to tailor their communication towards the different segments. The usage of Personas can be an additional tool that can help to understand and group customers. This accounts for companies of all sizes as all of the cases used segmentation. The targeted segments have to be defined carefully before the first implementation. In addition, there is the necessity to review the defined segments over time and potentially adapt them to changing behavior of the customers.

6.4 Creation of content

The creation of content was included in all of the cases. In addition, all of the cases have dealt with the personalization of their content. The personalization was either done based on the created segments and profiles or based on identified needs or previous bookings^{570 571 572}. In addition, through the interviews, the creation of content could be identified as a key factor within communication.

⁵⁶⁶ ("McAfee Increased Lead with Marketing Automation Strategy", n.d.)

⁵⁶⁷ (Neolane | Maybourne Hotels Selects Neolane Marketing Software to Promote Claridge's, the Connaught and the Berkeley, 2008)

⁵⁶⁸ (Interview 1: Head of digital innovation and IT of company A, Appendix p. 105)

⁵⁶⁹ (Köhler, 2017, p. 250 f.)

⁵⁷⁰ ("McAfee Increased Lead with Marketing Automation Strategy", n.d.)

⁵⁷¹ (Scherer, 2016)

⁵⁷² (Neolane | Maybourne Hotels Selects Neolane Marketing Software to Promote Claridge's, the Connaught and the Berkeley, 2008)

Overall, it can be concluded that marketing automation is a helpful instrument to deliver personalized messages and content. In addition, it was shown that the content should be tailored to the previously defined segments or personas. Again, the importance of individualization and content accounts for companies of all sizes as all of the cases used this approach. Therefore, medium-sized companies that aim to implement marketing automation should focus on the content that should be displayed as well. This is because a clearly defined content marketing strategy is important for communication overall⁵⁷³. They should further think about the usage of personas.

6.5 Selection of channels and communication tools

As shown previously, there are several channels in which marketing automation can be used. The channels that were used the most within the cases were emails and the companies' website. Further channels like social media platforms or communication tools like newsletter or retargeting were only used in a few cases.

Only two of the analyzed cases used offline channels within their marketing automation system. In the case of the Maybourne Hotel group this was done through direct mails⁵⁷⁴. In contrast, the case of Kverneland used print advertisements⁵⁷⁵. These two examples show the potential of including offline channels into the system.

Within the literature, the aspect of campaign management in combination with marketing automation was discussed several times. Within this part, search engine advertising (SEA) campaigns were not touched in detail so far. Based on the findings gained through the interviews, search engine advertising could be identified as another communication tool that can be ideally used with marketing automation. The SEA campaign manager from the interview 4 mentioned that they are working with marketing automation within every campaign for two years. In addition, he mentioned that the technology is suitable for any campaign and any company⁵⁷⁶.

Although Social Media Channels were not used in many cases, there is the potential to use marketing automation within these platforms. Especially within the campaign management within these channels⁵⁷⁷.

⁵⁷³ (Interview 2: Content Marketing Manager, Appendix, p. 110)

⁵⁷⁴ (Neolane | Maybourne Hotels Selects Neolane Marketing Software to Promote Claridge's, the Connaught and the Berkeley, 2008)

⁵⁷⁵ (Köhler, 2017, p. 248)

⁵⁷⁶ (Interview 4: SEA Campaign Marketing Manager, Appendix, p. 114)

⁵⁷⁷ (Interview 3: Social Media Manager, Appendix, p. 112)

Consequently, emails and the own website are suitable channels for marketing automation for companies of all sized. Further channels can be included as well depending on the individual preconditions of each company. In a first step medium-sized companies that aim to implement marketing automation should identify the channels in which they are already communication. Next, they should identify in which channels marketing automation can be used. The mentioned channels can give a first insight for this task.

6.6 Evaluation & Improvement

The analyzed cases showed that there is a need to evaluate and improve the system over time. Surprisingly, not all of the sources of all cases discussed evaluation or improvement activities. As the case of McAfee showed, these improvements can even include to change the software that is used for the marketing automation system.

Within the Kverneland case, a pilot project was implemented at first. After evaluating the performance of this project, the marketing automation system was expanded⁵⁷⁸. Another tool for the evaluation of the outcome is the split testing that was done in the case of the electoral campaign of Barack Obama⁵⁷⁹.

Overall, companies should be aware that the implementation of a marketing automation project requires the monitoring of the performance. In addition, potential needs for adaptations need to be recognized. Pilot projects can be a suitable approach especially for medium-sized companies that operate with limited resources. In this way the instrument can be tested to evaluate whether it can deliver satisfying results for the company.

6.7 Overall strategy

Although the cases share several similarities, it can be observed that the design of the marketing automation systems were directly tailored to the overall goals of the company. Although the goals were individually within each case, many goals dealt with the improvement of customer relationships or the delivery of customer experiences. This highlights the connection between CRM and marketing automation.

⁵⁷⁸ (Köhler, 2017, p. 248 & 250)

⁵⁷⁹ (Scherer, 2016)

In any case, companies that aim to implement marketing automation should define individual goals that should be reached through the usage of the system⁵⁸⁰. This accounts for companies of all sizes.

7. Conclusion and Outlook

Overall, companies and especially medium-sized companies that aim to implement marketing automation can learn a lot from these cases. The cases showed for which goals marketing automation can be used. In addition, it was showed how the projects can be approached. As key components for a marketing automation system, data collection, data analysis, segmentation, and content could be identified. In addition, it was shown that these components need to be evaluated constantly. Within these key components, significant differences that can be explained by the size of a company could not be identified. As a conclusion, medium-sized companies can also learn from cases of large companies.

As communication channels that can be used for the delivery of personalized messages, emails and a companies' website or specifically created websites could be identified. Nevertheless, there are further potential channels.

As mentioned within the introduction, the digitization has a great impact on companies⁵⁸¹⁵⁸². This includes impacts on marketing activities and communication. Some of the current trends within marketing were shortly mentioned. Nevertheless, there is a great potential that there will be more trends and developments in the future.

This development is changing the job of marketers and the processes within marketing activities. Marketing automation can be a useful tool to automate some of the processes. This allows marketers to focus more on the strategic aspects. They can use the time they gained through marketing automatization, to monitor the trends and developments in the field closely⁵⁸³. As a result, those marketers and companies have the possibility to be within the first movers or early adopters when it comes to innovation and creating outstanding experiences.

As the cases that were analyzed showed, marketing automation can be a suitable instrument for companies of any size or field of business. This accounts as well for medium-sized companies. The previous analysis includes insights for those companies how they

⁵⁸⁰ (Interview 3: Social Media Manager, Appendix, p. 112)

⁵⁸¹ (Yamamoto, & Lloyd, 2019, p. 127)

⁵⁸² (Naščáková et al., 2019, p.202)

⁵⁸³ (Interview 4: SEA Campaign marketing manager, Appendix, p. 115)

can use marketing automation and which tasks are necessary for the implementation. Although there were differences within the different components between the cases, it could be identified that the mentioned components are important for marketing automation projects of any company.

Marketing automation already requires or works best in combination with artificial intelligence. Especially within the parts of data collection and data analysis. It will be interesting to discover the new possibilities that arise with the constantly increasing usage of artificial intelligence in even more fields.

There is further the possibility that additional processes can be automated that have not been discussed. Within this thesis, the usage of marketing automation within communication was assessed. Referring to the theory of the four P's, there are three fields of marketing that have not been covered within this thesis: Product, Price, and Place. Therefore, there might be the chance to use automation within these three fields as well. The first steps of the general structure that was identified within this thesis can also be used for those fields. This accounts for the steps of data collection, data analysis, and segmentation and the creation of personas. The automation of these three steps might deliver insights that can be used for example for decisions in pricing or placement.

As the aspect of personalized communication is becoming more important, the upcoming changes in customer behavior can also deliver new opportunities. Therefore, social trends can also influence the future communication strategy of companies. Most of the cases showed, that the improvement of customer relationships was an important goal. Overall, the findings showed that all aspects are merged into one integrated system.

Within the aspect of content creation there were not much information about the usage of automation. Therefore, there is further potential to research automations that can be used within this component. As the content marketing manager that was interviewed mentioned, automated content is still difficult to achieve when complex content is required. In addition, there is the challenge that automated content should not be recognized as being automated⁵⁸⁴. Therefore, it will be interesting how these automated content software tool will develop in the future.

Another interesting aspect that can influence the development of marketing automation is the development of new communication channels as new channels deliver a potential for further automated communication. Overall, the newly arising innovations will not only deliver new challenges and opportunities for companies but also potentials for further research.

⁵⁸⁴ (Interview 2: Content Marketing Manager, Appendix, p. 109 f.)

Overall, the experts shared the opinion that the usage of marketing automation is going to increase in the future. In addition, they mentioned that this instrument will further improve⁵⁸⁵
586 587 .

It will be interesting to monitor which additional developments will arise in the future concerning digitization and marketing. These developments deliver additional potential for further research. Another influencing factor that will be highly relevant concerning personalized communication is the development of data protection laws. Although customer centricity and personalization is increasing, these laws might hinder the aspects of data collection and analysis. This can further affect more corporate activities than communication.

⁵⁸⁵ (Interview 3: Social Media Manager, Appendix, p. 113)

⁵⁸⁶ (Interview 1: Head of Digital Innovation of Company A, Appendix, p. 108)

⁵⁸⁷ (Interview 4: SEA Campaign marketing manager, Appendix, p. 116)

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Interview 1: Head of Digital Innovation of Company A (Case1)

Can you tell me something about your company (size, target group,...) and the role you have within this company?

I am working as the head of digital innovation and IT within a medium-sized Austrian company. Our company is operating within the sports industry, and we are selling our products in Germany, Austria, Switzerland, the Netherlands, Belgium, Liechtenstein and northern Italy. Our company is constantly growing. At the end of the business year 2020 we had around 150 employees and generated a revenue of 44 million Euros.

Within my role as head of digital innovation and IT I am responsible for a team that deals with the digitalization of several activities and processes of the company including marketing activities.

Why did you decide to implement marketing automation?

We are dealing with the digitalization of marketing and sales activities and processes for several years. And we are already using automations within our SEA campaigns. The question was therefore, "When are we going to implement marketing automation?" and not "Are we going to use marketing automation?". Our aim is to deliver great service and additional value to our customers. Further we want to strengthen the relationship between our brand and our customers. As our products can be individualized, the individualization and personalization of our communication is a logical next step. We believe that marketing automation can help us achieve those goals. Although we are working with a digital agency, our resources concerning staff and budget are limited so that we could not achieve the same output without marketing automation. Further, it would not be possible for us to implement marketing automation without our partner agency. Their knowledge and experience is very important for us.

Is it necessary for a medium-sized company to implement marketing automation?

In my opinion, marketing automation can deliver opportunities for any company. The size of the company does not really matter. It rather depends on the goals that should be achieved.

What are the overall goals that you want to achieve through the usage of marketing automation?

The implementation of marketing automation is closely connected to a project of delivering customer experience. We want to take our communication on a personal level and interact with our customers to improve the customer relationship. Of course, this includes the aim to deliver further services. We already have loyal customers', but we want to increase this loyalty even more. Of course, considering the output, this project should help to increase sales and conversions.

In which stage of the implementation is your company right now?

We are currently at the beginning of the implementation. So far we have defined the necessary steps for the implementation together with our partner agency. We have identified the data that we want and need to use within the project. In addition, we have defined target segments that will be used for the individualization of the content. Lastly, we selected the channels where we want to display our content. This is mainly our website, but we will also use the automation for email campaigns and our newsletter.

How does your process of implementation look like?

So far we have defined the strategy, our goals, and the necessary step. The first step within the implementation is now to include the aspects of the system into our CMS system Pimcore. The first aspects that will be included in the system are the data that is achieved through the created user accounts. Next, we implement our defined segments and the triggers on which the users will be categorized to the segments. At the same time we will connect the CMS system with our ERP software to use our existing customer data as well. Once this is done, we will test the data collection and the automatic categorization for the segments to see whether the defined segments match our users. We will also compare the segments with the personas that we use for our communication to improve the segments.

After this testing, we will start to create content that is tailored to the identified segments. This task will be again done by our partner agency. This will mainly include content for our email and newsletter campaign and our website. It is important for us that this new content is matching our existing content and additionally individualize the communication.

What are the main components within your marketing automation system?

The most important aspects are clearly the data that we can collect and use and the second major component is the content that we will display.

In which channels do you want to use marketing automation?

We will use different channels. One example are automated emails like emails that are sent to the customers on their birthdays if we know the date. And we will use automation to create an individualized newsletter based on the interests that the user has chosen on the registration. We will also include the automation on our website. With this approach, content that is tailored for the specific segment or information that can be interesting for the specific user will be highlighted and displayed more prominent compared to the other content. We will also give the opportunity to disable this personalization of the website because we know that not everyone is agreeing with this.

We also plan to use a retargeting network. This should be used if customers add products on their wishlist but they don't finish the checkout process. We want to guide them back to our website where they finish the conversion. This is currently a vision and not planned within the first start.

Do you aim to personalize your communication?

Yes. We want to improve our customer relationships and strengthen their loyalty. Personalized communication is important for us to achieve these goals

Is marketing automation helpful for the personalization?

Yes. Of course, Personalization could be done without automation. But with our resources it is not possible to do this manually.

How important is data for marketing automation?

Data is the key. This is not only for marketing automation but for almost everything. We already have a lot of data about our customers but so far we don't use it efficiently. Knowing our customers and changes in their interests is very important for many activities.

How do you collect data? What are the sources and where is the data stored?

We will use different ways to collect data. We will mainly try to get the users to leave their data on the website actively. This is done through the registration forms for the user account and the newsletter. This data will be matched with the customer data that we have stored in our ERP system. Like this we know the purchasing history of a user on our website that is logged in to the user account. Of course, we will use tracking tools on the website as well. With these tools, it will be observed for example which pages a user visits. This information will be added to the profile of the user. The goal is to get an overview of the customer and his / her purchases and interests. Based on these information, the users will be added to the segments. This allocation can change over time as we want to always have an actual picture of the customer.

How do you define the segments?

On the one hand we will start with segments that are based on our product categories. This won't be the only segmenting factor as we want to combine the segments with the interests of a user. The interests can cover additional content that is not only for one product category. We want to get a good overview of our customers and we don't only want to know which products they have purchased before. More important for us is what they are interested in today. We will also monitor the segments to check if we did the segmenting the right way.

How important is content within marketing automation?

The content is very important for all of our marketing activities. You can create a lot of creative campaigns but if the content does not interest someone, it is done for nothing. We need to know what our customers want and deliver content that is relevant for them. This is the key for every campaign.

We don't create the content ourselves. This is done by our partner agency. This agency has already created a lot of content for us. They know who we are and what our customers are. Some of the agency belong also to our target group. This is therefore a good match.

You are targeting customers in different countries. Does this international context have an affect on the marketing automation system?

We need to be aware that we need the content in German and in English. This is the most important aspect. To be honest, we are still focusing more on our German speaking communication but we know that we have to deliver the same experience to our English speaking partners and customers.

How will the development of marketing automation be in the upcoming years?

I think that marketing automation will become a standard tool for companies. More companies will use the tool and even more processes will be automated.

Interview 2: Content Marketing Manager

Have you already worked on marketing automation projects? If yes, on how many and can you name examples?

Yes I did. I worked on seven individual projects for one of our clients. Additionally, i am involved in a marketing automation project for our agency. This project is currently in preparation.

What were the goals within those projects?

There were different goals like reactivating the readers or increasing the engagement. Other goals were the increase of sales including upselling and cross-selling or the delivery of information itself. Overall, there were use-cases within different phases of the customer journey.

What do you think is necessary to implement and use marketing automation successfully?

The technical basis has to work reliably, the data has to be maintained properly and the triggers that define when an action is caused have to be implemented properly. In addition, the design and the displayed content are important aspects. The messages that should be sent have to be defined clearly.

Are there automations within the creation of content? If yes, can you name examples?

There are automations for the creation of content but we are not working with them (so far). For us, as editors of content, is is important to create authentic and unique content. This should further be appealing to read. This is difficult to achieve through the automated creation of content so far. Creativity needs the „human-factor“ and those „robo-content“ could lead to unpleasant reactions of the users as they might understand this content as deception. Especially within content that has a deeper sense or that is more complicated, the humans can deliver way better results than machines.

Examples for automated content are weatherforecasts or the results of sport events. In this cases, the automated content does make sense.

How important is content within marketing automation projects?

I think that content is one of the key factors. The better the content, the more receivers will be activated and will deal with the company, its products, and services. Especially the subject line within emails is important. I guess you know this by yourself. If somethin is written in an attractive way, you are more likely to continue reading. Similarly, you are more likely to open the mail if the subject line is appealing for you.

Within content that is displayed automatically, it is important that the content should not be recognized as automated. It should be recognized as a personal message that was created especially for you.

How important is content in general within communication?

A well-defined content marketing strategy is very important for communication. You need to define which goals you want to follow within which channels. This is the key to deliver good communication.

What are the additional challenges if the communication should be personalized?

At first, the necessary data has to be collected according to the DSGVO- regulation. In addition, variations of the content need to be created. This includes a „fallback content“ in case that the necessary data is not available for the user. The created content also needs to include parameters that can be filled automatically, depending on the data. This can be for example „You want to sell your [car model]? In this case, the model is filled automatically depending on the data that is available. If parameters are used, it is important that the sentences always make sense.

How important is customer data for the creation of content?

This depends on how personalized the content should be. In general, effective content can also be created without having information about the customers. If data, that can be used within the content is available and used, this can enable personalized communication. As a

result, the customers can feel that they are addressed directly and personally. This has to be done carefully and purposeful. Too much personalization can occur negative reactions in a way that the customers start to asks themselves how much does the company know about me.

In your opinion, for which use-cases can marketing automation be used effectively and in which cases is the usage of marketing automation not suitable?

Marketing Automation works best if data is already collected. This can be done in the customer management. An example where marketing automation works good are emails that refer back to a previous situation. For example: "Two weeks ago, you have..."

The goal of the projects that I worked for was to pull the customers back and engage them to actively deal with the company and its products again. Also new offerings can be displayed in this way.

There are cases when marketing automation is not suitable. One example is the selling of goods that requires a simple process for the decision-making like products for daily needs. Of course, there are always exceptions.

Other examples are companies that don't have competencies within the creation of content or if the margin of the products is so low that it can not cover the costs of the establishment of marketing automation.

Interview 3: Social Media Marketing Manager

Did you already work within marketing automation projects? If yes how many and can you name examples?

No, so far i did not work within marketing automation projects

Are there automation within social media marketing?

Yes, there are automations. Mainly within the area of campaign management.

For which cases can those automations be used?

The automations can be used for different cases. Examples are chat bots that are used for community management or automated messages for the purpose of customer service.

What do you think is necessary to use marketing automation successfully?

Necessary aspects are definitely a clear concept and technical and professional knowledge. Besides the technical implementation, the professional knowledge is important for the creation of messages that can be “fed” into the system.

Within the definition of the concept, the goals of the project need to be defined. In addition, the questions “Who should be targeted?” and “How do we want to do the implementation and what are the necessary components for our case?” have to be answered.

Which aspects can be automated easily and in which cases are automations difficult?

General information like FAQs can be easily displayed automatically.

It is difficult to automate the answers to specific and personal questions.

What are additional challenges in case that the communication should be personalized?

The challenge is to create the content and the writing in a way that is actually feels personal. The messages should not feel like they are displayed automatically. In addition, software that is used should be able to learn to increase the variety of answers.

How important is customer data for social media marketing?

Data is very important for the generation of leads. Within social media marketing we are creating leads through actions like giving the opportunity to win prizes or download options for further content like whitepapers. In this way we are collecting data that can be used for further communication purposes.

How do you think will the development of marketing automation in the upcoming years look like?

I think that the development is going to continue in the future. There will be a lot of further potentials and cases where marketing automation can be used. But this might take a few years. An interesting field is the application of audiovisual media like “Alexa” and more that will lead to further automations.

Interview 4: SEA Campaign Marketing Manager

What experiences do you have with marketing automation and how do you use it?

Well basically, this instrument exists for a few years now, but it is truly present since about two years. We are working with automations within every campaign especially with automated bidding strategies. So, we are using the search engine algorithms and machine learning to automate our bidding for keywords. Nowadays we don't do the bidding manually anymore, but the algorithm is doing this for us.

We are inserting our goals into the algorithm for example increasing the number of clicks or the number of conversions and insert values for those goals. Based on this information, the algorithm automates the process. This means that the algorithm is collecting the data and identifying the user that is searching for the specific keyword. The algorithm can also determine the relevancy of the user for the project based on the collected data. This relevancy influences the bidding strategy of the user meaning that the bidding for highly relevant users will be different to the bidding for users that are less relevant. This is basically our main application of automation.

Are there companies or goals where you would say that marketing automation is not suitable or is it applicable for any case?

I would use it in any case. Of course, you need a specific amount of data but less complex bidding strategies for example to increase the number of clicks can be used right from the beginning. More complex strategies to increase for example the conversion rates require more data and previous actions but in general I would use it in any case if Google does deliver the data. We will have to see how Google behaves in the future.

Are there specific preconditions for the usage except for the data?

The Accounts (like Google Analytics) have to be connected properly and conversion tracking has to be implemented if they want to be increased but for the increase of clicks there are no specific preconditions.

Is there anything that you can do wrong in the usage?

The goals have to be defined properly and need to be inserted into the algorithm. If the goal that is inserted into the algorithm does not match the goal of the campaign, the campaign won't deliver satisfying results. This needs to be considered anytime.

The budget is also important. If the budget is too low, the algorithm can't work properly with it.

Does the usage of marketing automation simplify your work and if yes in which way?

Yes it does simplify the work and it changes the way of my work. Previously I have spent a lot of time doing the bidding manually. Now I can use the time to develop strategies and work more as a consultant for our clients. So generally, my work is less operative and more strategic. So, the algorithm is doing the basic tasks for me.

Can you explain the process of the algorithm again more detailed?

The starting point is the campaign and the definition of the goals. Next the tracking is implemented. Then the campaign is transferred into the Google interface including the goals and data. Then the algorithm starts to learn (approx.. one week). The learning is including the recognition of the relevancy of users and keywords. The result is that the algorithm is displaying the matching ads. Overall, the campaigns will improve over time with continuous learning and data. Therefore, we don't follow short term campaigns or campaigns with few budget.

Does the algorithm improve the campaign itself or do you need to monitor and adapt the campaign?

The campaign is a "learning project". The algorithm is delivering the data but we still have to feed the algorithm with new aspects that the algorithm can continue learning. There is no perfect campaign. Continuous learning and adapting is always required.

How do you think will the usage of marketing automation develop? Do you think that there will be more automations in the future or not?

There will be for sure more automations. This is of course depending on the regulations concerning data protection, but I think that Google will find a solution for that. My vision is that in the future you only have to insert your goal to the algorithm and the rest will be done automatically. There will probably be more all-in-one solutions that can handle different types of campaigns. This will also simplify the usage.

Concerning the regulations about the data protection. Do you have to consider the different regulations in the set-up of the campaign?

This is not the task of the single users but Google definitely has to consider those rules. Of course, the tracking activities and the websites of the clients have to follow the DSGVO-regulations but within the Google interface, we don't have to think about these rules. We have to rely on Google and they are responsible.

Do you see an advantage for the customers that receive those ads?

I definitely see an advantage for the customers. Generally, no one likes to see ads but the advantage is that the ads, that will be displayed through the automation, are likely to be more relevant for the customers. This influences also the results of the search engine that will be displayed and the quality of the result for the users is going to increase.

Is there anything else that you want to mention concerning marketing automation?

Basically, it can be said that campaigns work best if they are compact and include a lot of data. There should not be too many details concerning the campaign.

Interview 5: Marketing Automation Project Manager (Company A)

Have you already worked on a marketing automation project?

I am responsible for the implementation of a marketing automation system right now as my company has decided to implement the instrument. This is the first marketing automation project where I am involved.

What is the current standing of your project?

We are implementing the first aspects right now. We decided to implement marketing automation one year ago. In the meantime, we had several meetings with our partner agency about the definition of the strategic concept. Right now, we are working on the data collection especially the user account that we use on the website.

Which aspects are included in your concept?

Our strategy includes several aspects. The first one is the data collection that is implemented right now. We had discussions where we can collect interesting data about our customers that we can use within the instrument. We defined to collect this in different ways. A good solution for us is to use data that the users give us actively. We will do this within a user account where the user has access to further services. Within the registration, they only must insert a few information like the email address. In addition, they can insert further data and they can specify fields of interest. Those interests can be very helpful for us to find out what our customers want. and they are the basis for the personalization that we want to deliver on our website.

We have also defined segments in which the users of our channels will be grouped. This is on the one hand based on our product categories but there are also segments that are influenced by the interests that can be specified. The users will be automatically grouped into those segments based on the data that they give us and the behavior on the website.

The channels where we will display individualized content are also included in our concept. We identified pages of our website and we will use the automation to send emails and newsletters. The newsletter will be composed based on the interests that were specified by the user within the registration for the newsletter.

What about the content?

The content will be provided by our partner agency. They will start with the creation once we have collected an appropriate amount of data. Especially the newsletter will require a lot of content as they should be sent on a regular basis. Here, we need a standard newsletter for all users that have not specified any interests and in addition we will need further content that reflects the interests.

What were challenges within the set-up of the strategy?

When we thought about the implementation, we collected a lot of ideas what we want to do. This included ideas for different messages, types of personalization and also channels where we can display those messages. The challenge was to reduce this list and to identify a few use-cases that we can focus on. We were lucky that our digital agency helped us in this step.

What is important to use marketing automation efficiently?

I think that the database is the most important aspect. Data is necessary to automate processes. But it is important that the data makes sense. This means that data that can be used should be collected. If you do this randomly, the output might be not satisfying. It is also important to know why you use marketing automation and what you want to achieve with the usage. You can't implement the system only because it is a recent trend. It should fit into the overall strategy of the company. You should also know what the tool can deliver. Therefore, I recommend searching for information about the tool before the implementation is started.

Is a digital agency necessary for the implementation?

That depends. I think that the knowledge from such an agency can be very helpful within the implementation. Especially if you are already working with an agency, they can be consulted. I think it also depends on the resources that a company has. The implementation requires specific knowledge and skills and of course personnel. If this is not existing within a company, a partner is useful.

Which tool or software do you use for your marketing automation project?

We are lucky, that the technical implementation can be done into the CMS system that we use. So we don't need a specific software. This simplifies the implementation for us and we can tailor the system to our needs.

How do you think will the development of marketing automation be in the future?

I guess that marketing automation will be used by more and more companies. In my opinion, the advantages for companies are high and the companies will see them. The tool itself will probably be improved in the future. We don't know what the future will bring but there will probably be more technological advances.

Statement of Affirmation

I hereby declare that all parts of this thesis were exclusively prepared by me, without using resources other than those stated above. The thoughts taken directly or indirectly from external sources are appropriately annotated. This thesis or parts of it were not previously submitted to any other academic institution and have not yet been published.

Dornbirn, 07. July 2021

Stefanie Natterer