Evaluating the Potential of a Marketing Automation System

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Laurea University of Applied Sciences **Abstract**
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The present thesis investigates how optimizing digital marketing through marketing automation can be performed via Kehätieto's website and the consequences that might have for the company's activities.

The purpose of the thesis project was to implement a pilot project based on the Mautic marketing automation system for a Drupal website. The results generated by the pilot were then evaluated by the company to find out about the service potential offered by marketing automation. The project was commissioned by Kehätieto Oy, a Finnish company that provides specialized IT services for non-profit organizations. The objective of this thesis project consisted of finding information related to marketing automation and Mautic to implement the pilot system on Kehätieto's Drupal-based main website.

The development tasks mainly consisted of research on topics such as digital marketing, marketing automation, the Mautic system and its core features. From these studies, the pilot implementation was carried out to apply Mautic and its core features such as tracking a Drupal site and executing marketing activities for its users.

The theoretical background define marketing automation and its features and examines complementary marketing strategies and tactics such as inbound, email and social marketing. Further research was carried out to understand, create and execute automated features with Mautic. Additionally, interviews were conducted to gain information the company specifications for implementation of the pilot project.

The pilot project was published on March 15th, 2018, and the collected data has been presented as results. The project successfully tracked the users on the site and applied the created marketing activities. In an approximate time period of two weeks, it was able to create four hundred and sixty-two leads and execute marketing campaigns on them. Furthermore the research shows that MAS is a viable service prospect for Kehätieto Oy. But the company should invest more in acquiring skills and expertise before a productive service can be launched.

Keywords: Marketing Automation, Mautic, Lead Nurturing, Lead Management, Email Marketing

Table of Contents

1 Introduction

1.1 Background of the study

The idea for the thesis came from Kehätieto Oy's needs. The need was to carry out a research on Marketing Automation System (MAS[1]) of their choice and to conduct a pilot implementation for Drupal Content Management System (CMS[2]). More specifically, the idea was suggested by the company's Production Development Manager when discussing about possible thesis topics that could be executed according to the company's need. To establish the background of the study, we based this paper on past research results, literature, online publications, and documentation with the view of implementing Marketing Automation Tool for the company.

Digital age has changed how business market their products and services. The traditional approach is rapidly changing and digitalization has opened new ways and concepts of marketing such as social marketing, content marketing, MAS and more (Chaffey & Ellis-Chadwick 2016, 6). In order to sustain or grow their business the companies have to adapt their strategies to reach their customers. Due to this, many opportunities have been unlocked and also many established companies are trying to secure this opportunity. MAS is one of such opportunity, it is a fairly new concept and at the moment only slight research and implementation has been carried out in Finland.

Currently many client companies are interested in MAS but they are reserved using it due to factors such as price, lack of knowledge and difficulty in implementation. So Kehätieto would like to find a solution to this problem by providing a tailored solution to their customers. The target is to produce a service that the their customers would have affordable access to use the benefits and features enabled by MAS.

1.2 Kehätieto Oy

Kehätieto is one of most experienced IT service providers in Finland's. The company has been serving non-profit organizations' for almost 30 years and is one of the oldest and most prestigious IT service companies in the sector in Finland (Kehätieto - Suomen kokenein 2017).

There main services are divided into three sectors: Customer Relationship Management (CRM[3]) System is the company's biggest service. The system allows many non-profit organizations the

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[1] Marketing Automation System - MAS
[2] CMS - CMS
[3] Customer Relationship Management - CRM

access to a tailored business tool specifically designed to meet their needs. It consists of features for business management and daily operations, customer management, fund raising campaigns and more. It has a wide range of features that can be used to manage the entire organization's operations with one system. Second sector is Web development service and the company offers specialized web development applications in Drupal CMS. Some of the organizations that the company has developed websites for are WWF Finland (World Wildlife Federation), Save the Children Finland, Finnish Association of the Deaf and Association of Finnish Pharmacies. Lastly, Kehätieto offers IT support services for organizations' IT infrastructure such as software, workstations, servers and more.

Currently the company employs about 30 individuals and is situated in Käpylä, Helsinki.

1.3 Purpose of the study

Kehätieto Oy has requested an implementation of a pilot project based on Mautic MAS. For that purpose, research must be executed on MAS and its features and implementation of the Mautic System with Drupal web application. Additionally, they would prefer an integration of MAS with company's CRM. The objective is to conduct research and with the resulting knowledge test and implement the pilot project. This pilot project will consist of basic features of MAS and these features would be according to the companies specifications. The main purpose is to produce results from the pilot project that Kehätieto can evaluate and consider MAS is a service prospect. The pilot project aims to answer if the company can tailor MAS service that meets their customer's needs.

The starting specifications from the company are that the MAS should be able to do the following: to track users, create landing pages and forms, categorize users according to their behaviour in the website and send automatic mails. The main goal here is to monitor the website of Kehätieto and execute marketing activities on them. Additionally, all specified features and categorization should happen automatically in real-time. Above mentioned purpose of the thesis generates following research goal:

<u>The main research goal is:</u>

1. Find out if MAS is a service that Kehätieto Oy can provide to their customers?

<u>And the goal generates following research questions:</u>

1. What is MAS?
2. How to implement Mautic MAS and its core features?
2. And finally to build Mautic MAS platform and apply features through specifications from Kehätieto Oy.

The company choose Mautic System as the preferred MAS. The main reason was because of integration, as both are an open source tools it is possible to integrate Mautic with Drupal applications. Additionally, as this is the first implementation, for testing purpose and learning about MAS, it is smartest to use open source tool like Mautic rather than paying for premium tools.

The scope of the thesis is to enhance digital marketing with Mautic system implementation. To find out what kind of MAS features exist and how to trigger campaigns/contents based on customer categorization of users. And finally to know if Mautic System could fulfil the requirements of Kehätieto Oy.

1.4 Thesis structure

The thesis is divided into five main sections: the first chapter includes general introduction of the thesis and brief information about the case company. The purpose of the thesis, the research questions and the scope are also included. The thesis includes my theoretical background in the second chapter. It consist of literature review about MAS and its consisting features and components. In the third chapter is about the research methodologies that are used for the thesis and in fourth chapter is about Mautic implementation. The results of the thesis are displayed in chapter five and finally, in chapter six the conclusion is presented.

2 Digital Marketing

According to Patel and Puri (2017, 1), “Marketing is the lifeblood of brand-to-customer or prospect relationship”. In their research on marketing automation Patel and Puri (2017, 1) have also pointed out that the field is also heavily integrated with sales. Therefore, marketing can be regarded as a vital part of business. Digital transformation has transformed marketing and businesses since the inception of the internet, the web and digital media. Chaffey and Ellis-Chadwick (2016, 6) mention, for example, that over 3 billion people globally use the web to search for products, services and entertainment and more. Because of change in consumer behaviour, the way companies market both to consumers and business have changed considerably.

The role of the marketer is also equally important even though their role is transforming constantly. Before they were the just brand builders but now with the help of technology they are the driving force behind the growth. Businesses have the possibility to achieve higher growth than ever before and track it. They provide customers and prospects with important information regarding the product or service, benefits of usages and try to stand out from their competitors. However, the most important aspect is that the companies rely on their marketers to form one to one connections with potentials, which then will lead to sales process. Marketers try to build long lasting relationship with prospects by looking for their interests, expectations and behaviours. In other words creating lead generation, the marketing process of appealing and rise interest in a product/service for the purpose of enhancing sales.

But nowadays it is really hard for the marketers to maintain one on one relationships and that is mainly due to technology. Further technological factors can be divided into two aspects: growth and consumer behaviour. (Patel & Puri 2017, 1)

In the world of modern marketing powered by the technology it is getting hard to keep up with growth. Marketers are now able to acquire infinite numbers of users with any geographical limitations, for example of some multinational Finnish companies serving the global population are Rovio and Supercell. As the growth increases the marketing program and processes will get bigger while there would be increase in redundant tasks like emailing customers, managing social media and keeping tracks of leads. The combination of these aspects will lead to operation deficiency and waste in resources. While those resources could be spent on analysing, improving and other important tasks such as marketing strategy, customer relation and campaigns. (Patel & Puri 2017, 1)

According to Ruud (2017, 2), on aspect of consumer behaviour "The impact of technology on consumers has turned business upside down. Technology has democratized the way brands, and consumers engage". In comparison to the traditional marketing, the era of digital marketing empowers consumers, they have the purchasing power more than ever before. Nowadays there is abundance of information, consumers have desired information available right away on their smartphones and other devices. Furthermore, the new digital marketing channels such as Social Media and Search Engine Marketing provide consumers with plenty of information's at their request. The quantity and quickness of information that can be acquired has

Figure 1 Digital marketing channels

led to change in consumers behaviour (Ruud 2017). Thus businesses also have changed how they do marketing to adapt to the changing environment.
Marketing Automation comes in as a solution for the businesses so that they can maintain growth and connect with consumers with multiple digital channels (Patel & Puri 2017). In the next chapter the authors describes how MAS will help organization control and direct growth.

2.1 Marketing Automation System

According to Hubspot in What is marketing automation? (2018), "At its best, marketing automation is a software and tactics that allow companies to buy and sell like Amazon – that is, to nurture prospects with highly personalized, useful content that helps convert prospects to customers and turn customers into delighted customers". Further they mention that marketing automation typically generates compelling new revenue for companies, and grants satisfying return on the investment. About Hubspot, it is one of the front runners in marketing automation.

Marketing automation is a component of digital marketing and some marketers often have misconception that it is similar to email marketing. Email marketing is one of the components of marketing automation. Marketing automation is software driven and the main leaders behind the development of the core ideas and the concept are software companies themselves such as HubSpot and Marketo. So basically marketing automation is software based solution for automating marketing tasks, process like the ones mentioned earlier and managing leads. Other automation software's available are Mautic, SAS, Salesforce, Infusionsoft and more. The software offers the business ability for managing their marketing from one place to generate leads and convert them into sales. Mainly it consists of lead management, social media marketing, CRM, email marketing and reporting and analytics (What is marketing automation? 2018). Leads in marketing context are defined as probable consumers who are interested in the product or service and have provided contact information.

Marketers require taking a quite big amount of time to execute repeated tasks manually for hundreds and thousands of leads. Additionally, also the content sent to the customers would be very general as the marketer cannot possibly personalize content for each leads. Whereas, marketing automation makes communication with customers stronger and allows the marketers form one-to-one relationship with leads (Patel & Puri 2017). By collecting data on prospects, interests and behaviours, marketers can send personalized and more relevant one to one targeted content to the customers.

To highlight, marketing automation enhances and empowers organization and business by giving them following abilities: adding dynamic content, categorizing leads and integrating marketing channels. Another great feature of marketing automation is that it allows to categorize based on criteria’s such as behaviours and demographics. For example, categorization can be created for leads from different parts of Finland such as Category “Uusimaa” for saving contacts belonging to that region and others categories for remaining. As mentioned above, marketers can add personalize content based on leads profile, they can display or send contents and offers to leads based on different categorization. Finally, MAS offers a complete cross platform user experience by allowing to integrate with multiple touch points such as social media, email and content marketing. The marketers will have information about the conversion path of leads from the different touch points and can plan each of the touch points for satisfying conversion increment. (Patel & Puri 2017, 2)

As software is a core part of marketing automation, many marketers have misconceptions that it is mostly about technical skills and are confused or reluctant to use it. Patel and Puri (2017, 2) point out that, “There are a lot of people out there who call themselves ‘experts’ in marketing automation. But they’re not experts in marketing automation. They’re exceptional at using software”. Further the researchers mention that marketing automation is mainly about understanding the difference between marketing strategies and tactics. Plus they add, to succeed with marketing automation marketers need to apply balanced mix of strategy and tactics. In this context the strategies relate to creative and structured marketing frameworks. For example, inbound marketing is one of the marketing strategies for creating new leads. On the other side, tactics refer to specific marketing techniques, for example, personalized emails could be considered marketing tactic for email marketing.

There is also another misconception among many marketers. Hubspot in What is marketing automation? (2018) mentions that “However, the term “marketing automation” has become a buzz-word, where marketers seek out MAS under the impression that all of the digital marketing tools necessary for growth, including those needed to generate new leads”. This misconception causes challenges after implementation. With lack of knowledge about marketing automation and its strategies, marketers usually later realize that marketing automation is not about generating leads, as a result they will end up purchasing emails to nurture leads instead. This method is rather short-term, as it does not create a good foundation for healthy relationship and long-term partnership with consumer. This is because most consumers feel spammed with emails that they have not requested and hence gives them bad image of the business. This kind of method is known as outbound marketing. For long-term partnership and healthy relationship marketing automation should be used with a more modern marketing strategy known as Inbound marketing. As a result, not only marketing automation will be more successful in forming long-term healthy partnership with their customers, but also will have substantial increase in return of investment. (Patel & Puri 2017)

Therefore, the author would like to point out that marketing automation is a technical solution which is provided by applying a marketing strategy and tactics to achieve marketing goals. So to successfully apply marketing automation requires qualification in both technical and marketing skills.

2.1.1 Marketing Automation Funnel

Marketing automation is a complementary process. In order to successfully implement marketing automation, a better understanding of the role of marketing automation is required. At first, it is important to recognise that MAS is not about lead generation but lead management. Marketing automation is a mediating process that works between process of lead generation guided by marketing strategy such as inbound marketing and sales processes. Basically in marketing automation consumers are guided into the mentioned three stages of process which is known in marketing as a funnel. The consumer passes through each of the process in the funnel starting as a lead prospect, who is nurtured and converted into a lead. These leads then are converted into customers who contribute to the business. However, the process of converting leads into customers is a time consuming process which also depends on the type of business but once the leads are converted into customers usually the customer-brand relationship is long lasting (Kahra 2016, 23).

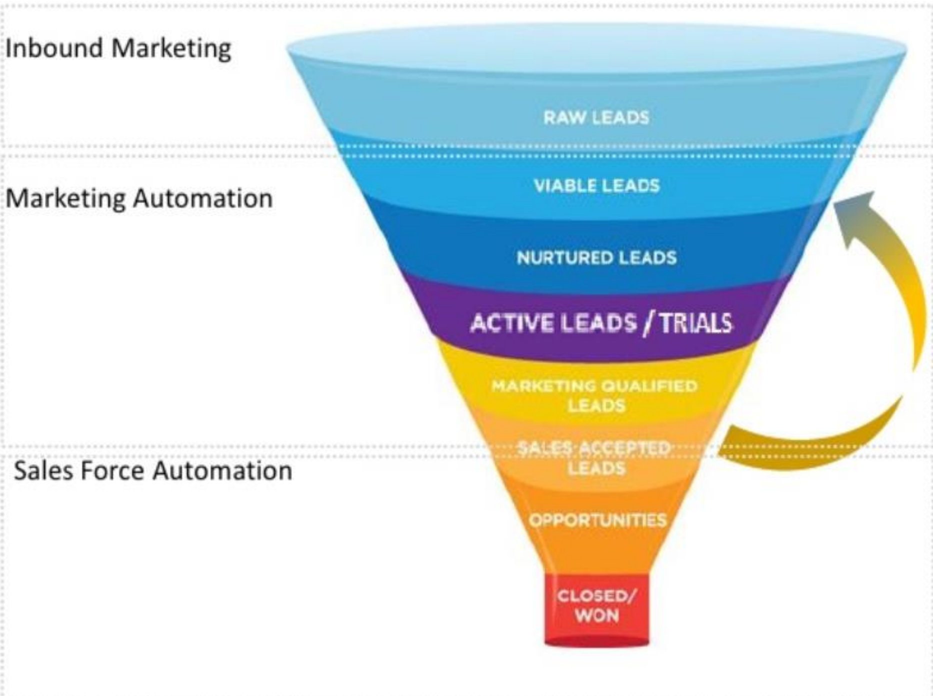

Figure 2 Marketing Automation Funnel

The first process in the marketing automation funnel is Lead generation and it is as following. Here audiences are targeted the with content through multiple digital channels and campaigns such as social site, website, blog, email and direct mail. Simply, it is the process of building up leads pool or in other words generating leads. Usually the strategy involved in this stage are usually inbound or content marketing and the selection of the right strategy depends on organization and their businesses. (Lead generation 2018)

Inbound marketing is an opposing marketing method of outbound marketing. While both of them are used to increase leads in the database, their approaches differ. On the other hand outbound marketing is a traditional method and it includes emailing to purchased listings, advertising, outsource telemarketing and trade shows. The approach of this method is to spread out its message and to get consumers' attention in a disruptive and aggressive manner. For example, one of this kind of marketing types is an oversupply of commercials such as banners and ads when consumers are online and countless spam emails. But due to its method, it is viewed as neither productive nor efficient, as consumers dislike them due to their approach and are finding ways to block this kind of marketing. Also in relation to inbound marketing it is costlier and returns less Return of Investment (ROI[4]). As marketing automation focuses on building a long-term strategy and due to the reasons mentioned above inbound marketing, which is more friendlier and new method of marketing, should be used with marketing automation. (Halligan 2017)

Inbound is a modern technological marketing method that has an approach differing outbound. That is instead of forcing their messages to the consumers, inbound attracts or makes them look for a service or product by creating appealing contents. This is different practice for customer acquisition that is built on human-to-human relationships. This approach is more natural as it practices attracting consumers with contents and marketing materials that is more aligned towards the customers interests and thus putting the business in position to attract. Inbound is used with other technological components such as Content creation, Search Engine Optimization (SEO[5]) and Social media to reach and attract maximum quantity of consumers. (Patel & Puri 2017)

Content marketing is another core factor of digital marketing and mostly it is considered as the subset of inbound. Mainly it is about creating content that interests consumers which they can relate to. This content is qualitative, entertaining, engaging and shareable. (Chernov 2017). SEO is all about making the content available to the consumers via search engine. For example Google search engine, is the most popular and billions of users use it for finding information regarding a service, a product, a brand and more. (Pulizzi, 2011). It is the place where most of the consumers start their buying process, therefore, it is important that the content is available and it is ranked well in the search engine rankings. Lastly, about social media, it increases the impact of the content. (Rose 2013). Sharing the content helps building

[4] Return of Investment - ROI
[5] Search Engine Optimization - SEO

trust, as it is discussed in social networks of the consumers. Hence, more leads are attracted towards the brand.

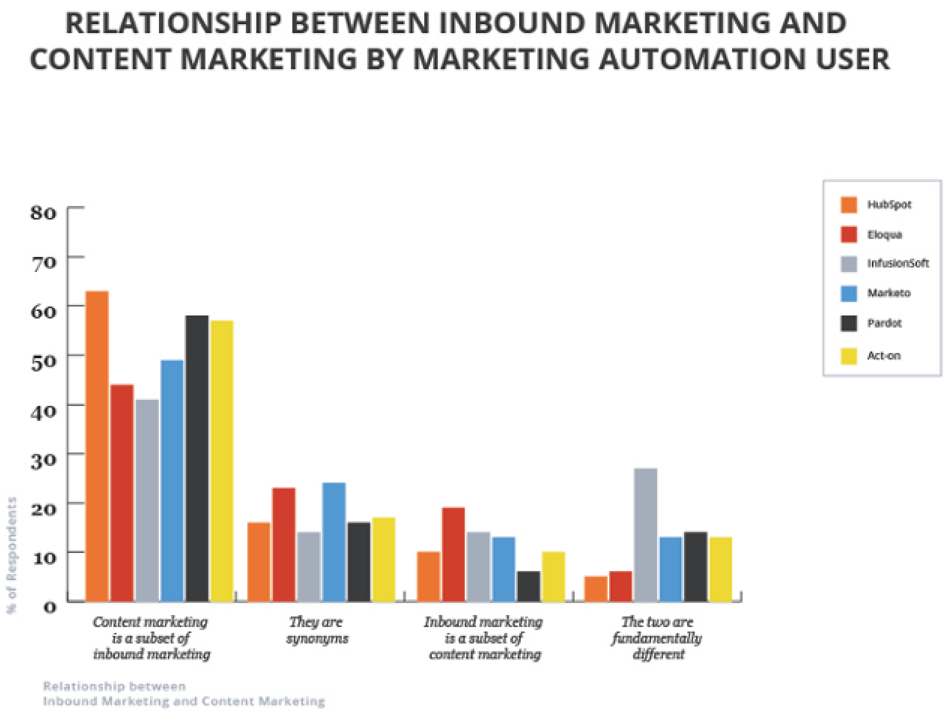

Figure 3 Marketing Automation relationship between Inbound and Content marketing

By planning and applying correctly the above mentioned strategy will serve as a good foundation for generating leads for the business. Once the business has leads, the process nurturing and converting them begins. This is the part when the process marketing automation is executed in the marketing funnel. On the next chapter is presented the other constituent processes of the funnel, marketing automation process, its components and how it leads to sales process.

2.2 Marketing Automation Process

The Marketing Automation process basically consists of four stages as shown in the figure 4, Marketing Automation Process. These four stages are Attract, Convert, Close and Report. The first stage Attract refers to the audience or lead acquisition through contents and presence in social media and more. (Patel & Puri 2017, 2). In the earlier chapter, the author mentions about how inbound marketing generates leads and in this stage Inbound marketing can be implemented for attracting traffic.

Second stage of marketing automation, Convert, is the stage where those attracted visitors are qualified into leads. Theoretically, this is the process where the system initiates to get familiar with the visitors. When visitors visit the website of the business, they start as anonymous visitors. The marketers do not have any information about their identity, interests or demands. So the important aspect here is to get familiar with the visitor, by doing so will convert them into leads which means that the system has some information about the visitors and from there the system starts to form one-to-one relationship. Forming relationship requires getting to know to leads interests and demands as well as getting to know what kind of consumers the business are interested in. (Patel & Puri 2017, 2).

In Marketing automation there are different approaches for lead conversion but the minimal is to request an email address of the visitors. This would generate email lists of all the visitors, who then can be reached out to inform and engage about the content such as new blog post, a discount coupon or launch of a new product or service. The goal here is to nurture as many leads and to optimize conversion. There are some important marketing automation components for this purpose. These components are Calls-to-Actions (CTA[6]'s), Landing Pages, Forms and contacts. The components can be personalized so that the leads can relate better with the content. (Kolowich 2018). After the system has information about the lead, it will automatically start to track its behaviour in the web application. It will collect valuable data related to the leads. This data collection will be regarding demography such as geography and behavioural like views, searches, clicks on the webpage and more.

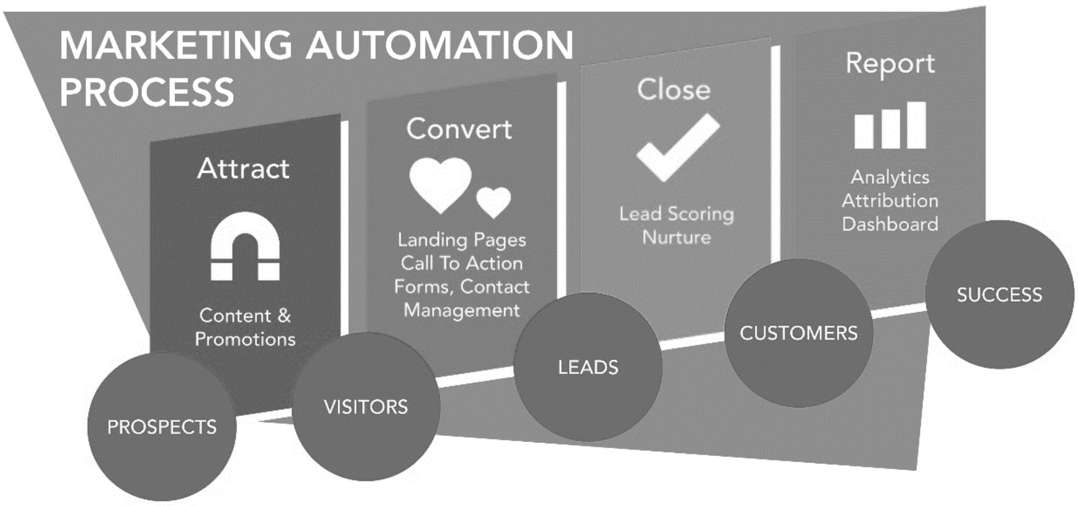

Figure 4 Marketing Automation Process

[6] CTA - CTA

The third stage, Close, is all about lead management and converting these leads into customers which is presented in next chapter.

2.2.1 Lead Management

Marketo in Lead management (2018, s.1), defines Lead Management as, “Lead management is the process by which marketing acquires, evaluates, nurtures and hands off leads to the sales team.”. This is the stage where the generated leads are nurtured and converted into contributing customers. Lead management is a vital process as here customers are generated from leads, however not every lead convert into customers. Having a good lead management strategy is important in order to get information that can separate strong leads from weak ones. Businesses that do not have good lead management strategy often end up wasting valuable time and revenue by chasing weak leads that do not convert into customers. (Lead management 2018). Hence, lead management is the method to improve sales pipeline. For this purpose lead management strategy is a combination of Lead scoring and Lead nurturing. Lead Management, lead scoring and lead nurturing are components of marketing automation which works together with the objective of developing sales ready leads. Sales ready leads in this context refers to those leads that are interested and ready to buy the product or service (Lead management 2018).

Basically lead management consists of two processes, first process refers to generating sales ready lead and for this purpose some criteria is needed to be established. And second process that serves as the needed criteria to define when are leads ready to purchase. Combination of the processes makes lead management whole which assists converting leads into customers. And finally, the whole process is automated and marketers are able to evaluate not only which content triggers interest in the leads, but also their likes and dislikes.

Defining sales ready leads is the process where a criteria or framework is established to evaluate leads. The outcome is that it helps to separate leads who are ready to contribute and those leads who are interested but need more nurturing and attention. (Marketing automation is lead management 2018). Thus it provides information’s so that marketers can focus their time on nurturing leads. At the same time sellers can approach sales ready leads or MAS can trigger sales related activity. In long-term, this is much more efficient and cost effective for organizations. For instance, Lead nurturing benchmarking study (2014, 7) mentions two-thirds participants reported that in comparison to non-nurtured leads, nurtured leads produced increase in sales opportunities. Data collected by MAS can be measured and reported so that marketers and can improve the criteria of defining the leads.

On the other hand generating sales ready leads is a longer process which is to generate qualified sales ready leads. It involves lead nurturing and also lead scoring for better defining leads (Lead management 2018). Basically in this process leads from the database are nurtured with the goal of converting them into sales ready leads. MAS combines lead nurturing and lead scoring for making better judgement regarding when a lead is ready to become a customer. According Heinz (2012, 7), “Sixty-five percent of best-in-class companies define & execute multi-step lead nurturing processes, and 59 percent of these same organizations (vs. an industry average of 25 percent) utilize lead scoring to progress leads over time”. As the earlier process generating sales ready leads is totally data driven so quality data is important to make the sales representatives take the right decision at right time.

2.2.2 Lead Nurturing

Lead nurturing is a process of nurturing and qualifying leads who are ready to purchase or in other words converts leads into customers. The characteristic of the process is to deliver targeted and personalized content with the aim to have continuous communication and interaction with the leads. The important aspect of lead nurturing campaign is that the communication is consistent and the content is valuable, relevant and according to the factors or preferences of the leads. In other words, marketers need to know about individual preferences of their leads, such as their interests, challenges and favourite or common medium of communication. So, it is essential to determine or understand those mentioned points while MAS is the technology that will make them achievable. (Lead management 2018)

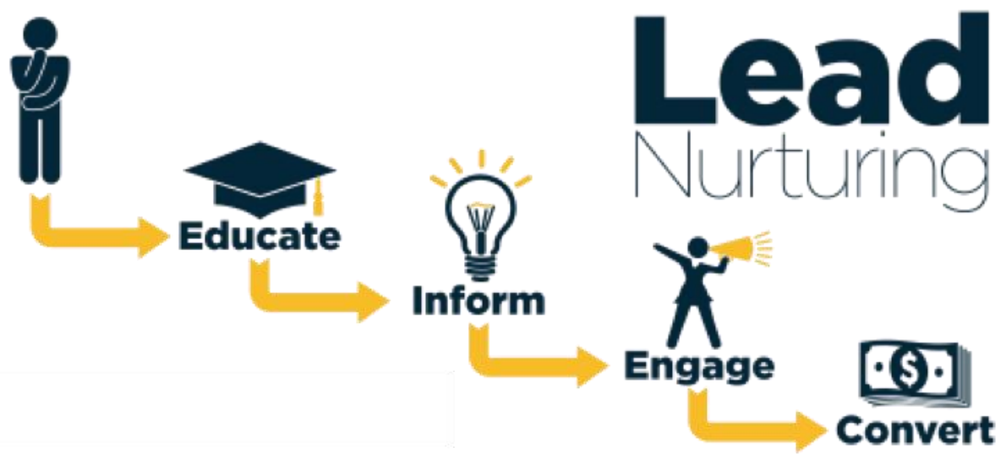

Figure 5 Lead nurturing process

To elaborate, MAS tracks and determines individual preferences of the leads. It is possible to know what topics or subjects interest them the most and the challenges that they are trying find a solution in the business. As MAS tracks different touch points the information is available to know which communication medium makes the leads respond better whether it is social media, emails or a mix of communication mediums. MAS enables the possibility to determine the leads specific information. This permits the ability to coordinate efficiently business specific communication strategy for lead nurturing.

According to Pay (2018, s.3) in Lead management, “Lead nurturing is at its most powerful when messages to the prospects are triggered based upon their actions”. Contents are delivered determining the behaviour and status of the lead. The historical behaviour can reveal leads preferred topics and interests while at the same time provides information regarding their readiness for a purchase. For example, a nurtured sales ready lead would respond positively to a delivered CTA form for purchase or donation in comparison to unnurtured leads. In such a case it would be beneficial to deliver content that would boost or support the lead towards purchasing. Therefore, many leads in the database who are interested in product or service will require further actions or support to passage to sales. Further Pay (2018, s.3) mentions that nurturing is necessary for building a long-term and stable relationship with leads and customers. Nurturing helps them to evaluate the expertise of the business and also influence physiologically for receiving such valuable content.

2.2.3 Lead Scoring

Lead scoring is basically a scoring method that assigns numbers or points to actions or behaviours executed by the leads. The method enables to track down three essential leads insights: their sales readiness, product interest and cold lead indication (Kahra 2016, 23). By collecting data upon metrics such as demographical, behavioural and operational it helps sales teams determine those leads who are interested in the solution. In addition, business will also recognize leads that they are most interested. For scoring leads business should first define a Lead scoring threshold or, in other words a criteria, in order to define those who are sales ready from the ones still needing nurturing or marketing activity. Defining a threshold aids to specify whether a lead is still in the stage of nurturing or is he/ she is ready to transferred to the sales funnel. (Lead management 2018). Kolowich (2018, 5) points out, the most common approach of creating lead scoring criteria is by observing the historical data of past leads. The common attributes should be focused from the leads that converted into customers and those who did not become customers. Thus, this will reveal which attributes are important and should be focused to define the lead scoring criteria.

The leads can be scored using different grading techniques, for example grading can based on alphabets or numbers like A,B,C or 1,2,3. Also, leads can be graded using of keywords like “HOT”, “COLD” or “Red” or “Green”. (Kahra 2016, 23). For example, an example of lead grading can be based on a demographic criteria. It can be defined in a way that the leads are only targeted on certain geographical region, so all leads within the target geographical region can be scored a value of plus one and otherwise negative value of minus one. Another example would be a criteria based on online behaviour of leads on the website. (Kolowich 2018). There interaction can be used to find out if they are interested in buying or contributing to the business. For instance, scoring can be done based on how many page views or visits to high value content, forms like checkout forms and their other actions in the website. Lead scoring process helps to prioritize leads and sales team with generated information can focus on sales ready leads while saving time and resources by separating weak leads (Lead management 2018). As a result, organizational productivity and efficiency will be enhanced and better revenue is generated. Therefore, lead scoring and lead nurturing are incorporated for managing leads in the leads database and channel them towards sales funnel.

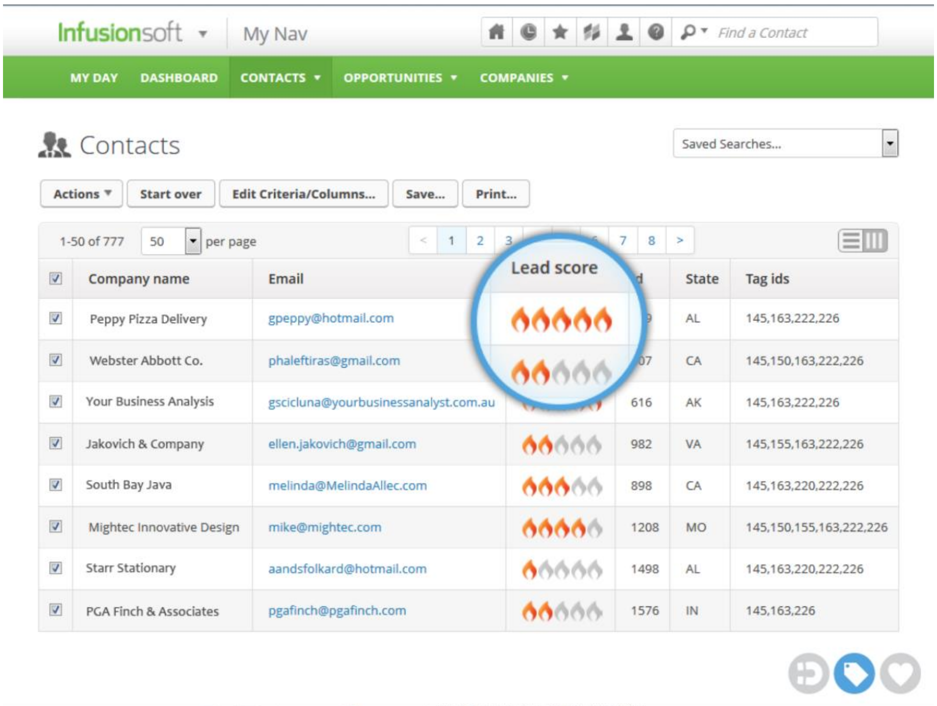

Figure 6 Lead scoring in Infusionsoft MAS

The mentioned methods are all integrated components of Marketing Automation. MAS is a platform that has combined modern methods of lead generation and lead management for increased organization efficiency and growth. For most efficient outcome MAS is used with Inbound marketing along lead management with lead nurturing and scoring.

Lastly, MAS also generates reports and feedbacks that marketers can analyse and use to evaluate their marketing actions and their performance. The report will allow to monitor aspects such as number of leads generated, total visits to the website from different touch points like different social media platforms and email, page views, forms clicks and more. From this information markets have knowledge about the leads interests, their preferred medium of communication (Patel & Puri 2017). But the report MAS provides alone only provides marketers limited leads insight as well limitation for managing leads. Because it is not possible to get feedbacks or reports once the sales ready leads are moved to sales funnel and interact with sales team or sales process. For this purpose MAS integration with CRM is recommended, as sales team use CRM to save data and communicate with their customers. This allows transfer of data between the two systems and MAS will have access to data on leads interaction in the sales funnel. (MacFarlane 2011).

2.2.4 CRM Integration

Integration with CRM gives organization the ability to monitor marketing campaigns and leads interactions into even higher level or CRM level. MAS integration with CRM is an optional approach but it is important for managing leads. Integration is essential as it brings together marketing and sales teams/ information together. This will enable possibility to make better judgement based on shared information as a result will improve marketing and sales activities. Basically integrating MAS with CRM will ensure real-time communication between the marketers and sellers. MacFarlane (2011, 2) mentions that integration with CRM system will allow lead information to be transferred continuously between marketing and sales team, ensuring that the right message is presented at the right time. The transferring of the data is bi-directional as both systems MAS and CRM are able to send and receive data. For instance, any information that has been updated by seller in CRM should automatically synchronized into MAS so that the marketer will be updated as well and vice versa. (MacFarlane 2011)

For MAS, information from CRM would provide MAS and marketers access to valuable data from the sales funnel. They can monitor aspects such as costs of generating and nurturing leads, success rates marketing campaigns, conversion rates from leads to costumers and much more (MacFarlane 2011). As a result, it will help understand the strength and weakness of the marketing activities or in other words evaluate successfulness of their marketing campaigns. This will enable marketers to optimize those activities and campaigns to perform better and effectively. As for sales team, they get the benefit of real-time information about leads and they can make better and quick judgement. For example, when sales team receives information that CRM has imported data about leads scored “hot” in the sales pool, they can quickly act towards executing the business.

Additionally, there are some integration functions that can be performed by integrating MAS and CRM systems. Functions such as activity alerts, campaign integrations and triggers, export leads based on scoring and more can be used. Some functions are triggered when an action is executed, for instance, MAS will send automatic alert to sales team once a lead visits a high importance page, form or lead scoring action. Automatically MAS will export data to CRM when leads reach a defined lead threshold and the sales team can take action based on score of lead. Other functions such as campaign integration includes reporting based on synchronized data between two systems. This report combines data from both systems and enables marketers to measure ROI by comparing revenue with marketing campaigns/ activities. (MacFarlane 2011)

CRM integration is beneficial to organization as it provides and shares valuable data with MAS. When marketers and sales team work together they provide each other with information that can be used to optimize their actives. MAS allows marketers potential to generate and nurture vast numbers of leads that then are transferred to sales funnel for sales.

3 Research Methodology

The research methodology used as data source are both qualitative and quantitative research methods. The aim of the thesis is to implement a pilot project based on integration of Mautic-MAS to Drupal website. For this purpose theoretical background was formed regarding Digital marketing and Marketing Automation System, Mautic. The theoretical background consists of secondary information collected from various literature and online sources. Secondary data is a research methodology where data is collected through already published documents from individuals or organizations (Marketing research and information systems 1997). For the purpose of this research work and for fulfilling the objectives the author believes that collection of relevant secondary data is sufficient. In order to validate the accuracy of the data the secondary data sources have been evaluated. So for that reason, the author has used multiple sources and cross-checked to conform the consistency and minimize the risk of having biased or unreliable data. In addition, the research method was also applied for implementing Mautic with Drupal website and for creating different core functions.

For the implementation of the project an empirical research methodology, Interview, was executed. To build Mautic features, many information were required. For this purpose, the company representative was interviewed. The interviewing questions were about the expectations of the company on what the MAS should be able to achieve, what kind of features they desire and about users segmentation in the system.

About the interviewee, Henrik Stürmer is the production manager of Kehätieto Oy. His main responsibility is to manage and oversee web projects of the company. The thesis topic was based on his suggestion and desire to test Marketing Automation service as a business solution.

Through the interview a lot of important information was collected regarding the structured and functionality of the system. Firstly, the basic structure for categorization of users of the website into different marketing segments were established. Based on the information the websites' most important or valuable web contents were tracked and decision was taken to build marketing customer segments based on those important contents. Those tracked contents that received the most attention from the users were the webpages with information regarding different specialized business solutions. Therefore, the Mautic segments were built on those solutions and the segmentation was based on web solutions, guild solutions and IT-support. The users would be then segmented into these three segments based on their historical behaviour in the website. As a result it would be much easier to create and implement specific and personalized user centred marketing campaigns that can interact efficiently with the users and yield better results.

In the thesis the interview is included at the end of this document. Finally, next section is about the main chapter of this project, Mautic implementation.

4 Implementation of Mautic MAS

4.1 Mautic setup

The preliminary step for implementation of Mautic MAS to was install Mautic and configure Mautic. The initial plan was to host Mautic in Kehätietos Oy's own server and the work was carried for the same purpose. As the author did not have required skills for server installation, support of specialist from Kehätieto was acquired. However, the system encountered some issues with tracking the website in from the server and due to difficulty and also the time constraint, this approach was abandoned. Instead a more easier and faster option was used for this implementation and that was to use free cloud hosted Mautic sytem offered by Mautic itself. It offered all the core functions with some limitations such as number of emails that can be sent, a restriction of custom domain and a cloud database in Mautics' own server.

The cloud version of Mautic was created with domain name https://kehatieto.mautic.net. The steps to set up the system was quick and straight forward via Mautic.com. In order to add Mautic system it was required to create a free user account first. The image below represents Mautic systems dashboard, where is the summary report of the site monitoring. It displays information such as contacts created, email performance, leads conversion and much more which we will discuss further on later chapters.

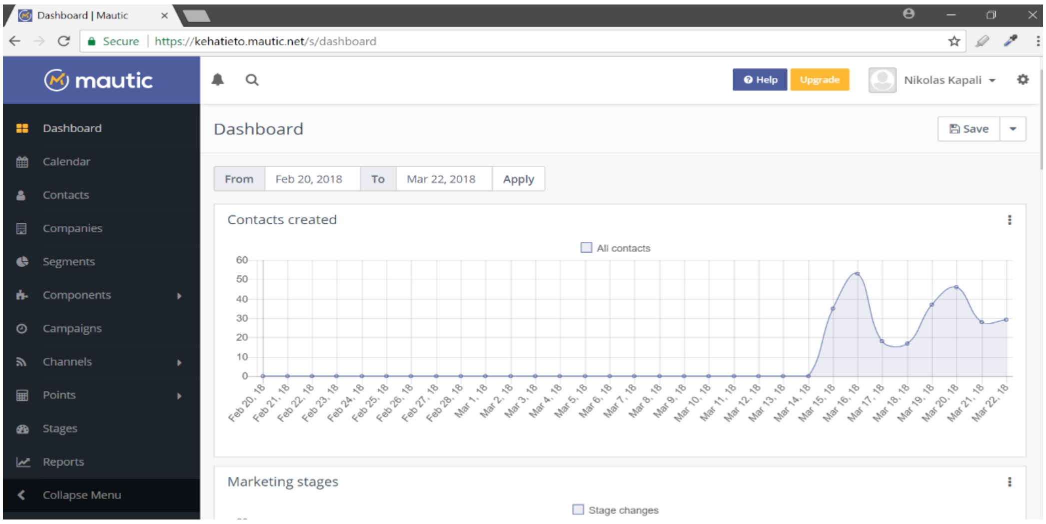

Figure 7 Mautic Automation System

In addition, a development environment for Drupal site was created for testing Mautic. The plan was to first test the Mautic and its features in this development environment and then apply Mautic to Kehätietos Oy's official site. The clone site was based on www.kehatieto.fi which is the official website of Kehätieto Oy, a Drupal version 7 site. This test site was used to try out features of the system such as monitoring and tracking, integrating Mautic content with the site such as forms, landing pages and automated emails and further to get the user data to Mautic for analysis. With the data and results gained from the testing in test site and test users it was possible to implement and develop a working pilot automation system for the main site its users.

On the next topics the implementation of core functions of the automation systems in accordance with the company's needs are covered.

4.2 Mautic configuration & Drupal integration

After the installation of Mautic, there were two following important tasks. First, the configuration of the system and then setting up the pilot Drupal site for test purposes. The main configurations were regarding CORS[7] or Cross-Origin Resource Sharing settings, tracking and email setting. Other configurations were just minor that dealt with settings such region and time. In

[7] Cross-Origin Resource Sharing - CORS

this document only the most important and relevant settings are discussed such as tracking and CORS settings.

Tracking settings were regarding how the system would track the users. Basically it offered three ways of tracking and only two these methods were used. The settings allowed to track users by IP address, by tracking url or the fingerprint method. When users are tracked using IP address, the system would track each IP address as an individual contact. This method is not so efficient as there is possibility to duplicate users. For instance in case of shared IP address, different users using same IP address will be tracked as a single user. Second method to track via tracking url that would be installed in Drupal, this tracking url is a simple JavaScript script. This is the primary method to track users as it is the most reliable mode of tracking. Last method, the finger print method that is still in beta mode and is not fully implemented in Mautic so it was decided to be removed from the pilot project. Using both methods together returns an accurate tracked data, but to add more reliability Mautic also uses a cookie method to identify unique visitors. By using these methods Mautic makes sure that each and every unique user is identified for the marketing purposes. (Mautic documentation 2018, 17-19)

Another important aspect CORS settings is regarding allowing permission for communication between two systems which are in different domains. CORS, is the method for open access between two different domains (Cross-origin resource sharing 2018). Here in the configuration only the url of the sites that can communicate with the Mautic system are included. This way the system can monitor the website and track its users, plus Mautic contents can be displayed and accessed by the users. In practical terms, Mautic would send CORS request to the websites url that is declared in the settings for intercommunication. There are two domains that were added in the setting which were the test site and the main Kehätieto Oy's site.

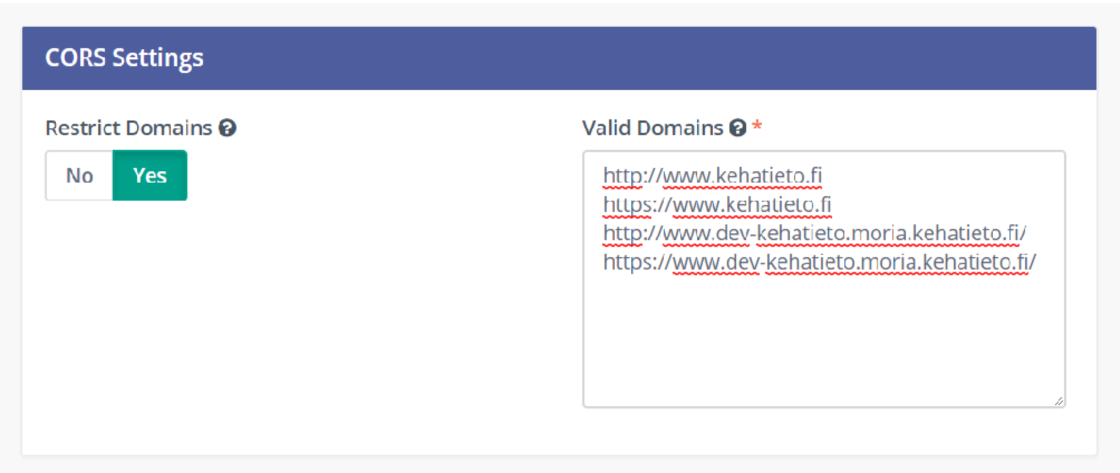

Figure 8 CORS setting

The half part of integration between the two systems has been presented, Mautic and Drupal. The part that Mautic sends CORS request to the mentioned urls are presented above, so now further is included about the other part where Drupal accepts that request. In Drupal the CORS request was accepted using a Drupal module called Mautic-Drupal. At the time the official module hosted via Drupal.org only supported Drupal version 8 and no other module allowed the support so the author used github based module for Drupal version 7. The module was downloaded and copied to the Drupal dirroot directory under modules -> contrib folder. When this module was enabled and configurated by providing the url of the Mautic system, it enabled that the site would accept CORS request sent by Mautic thus enabling two way communication between the systems. In addition, it also added a JavaScript tracking pixel in the website which enabled user tracking in the whole site. So the integration provided a two way communication and as the tracked site would pass the information to the automation system while the system would execute some action based on the information.

4.3 Site monitoring and user tracking

The core feature of Mautic MAS is to monitor the website and track individual users who visit its content. The system distinguishes two types of contacts: Visitors and Standard contacts. Visitors are anonymous users who have not been identified, although tracked by Mautic. Standard contacts are identified contacts via form or other sources and while enough data are available in the system primarily name, email. Every time visitor enters the site the tracking pixel is loaded which can track various information of visitors. By default Mautic tracks an IP address and a date of activity but it is not limited to only those. Other information such as location, email address and other fields can also be tracked. Some fields might need a support of a service or plugin for usage like social media information while others require interaction such as forms for instance email address. (Mautic documentation 2018, 221)

Image below is represents listing of anonymous visitors on the website. The gathered information regarding their IP address, location and points can be noticed and once they are converted into contacts, different information, such as their emails and names, will be displayed.

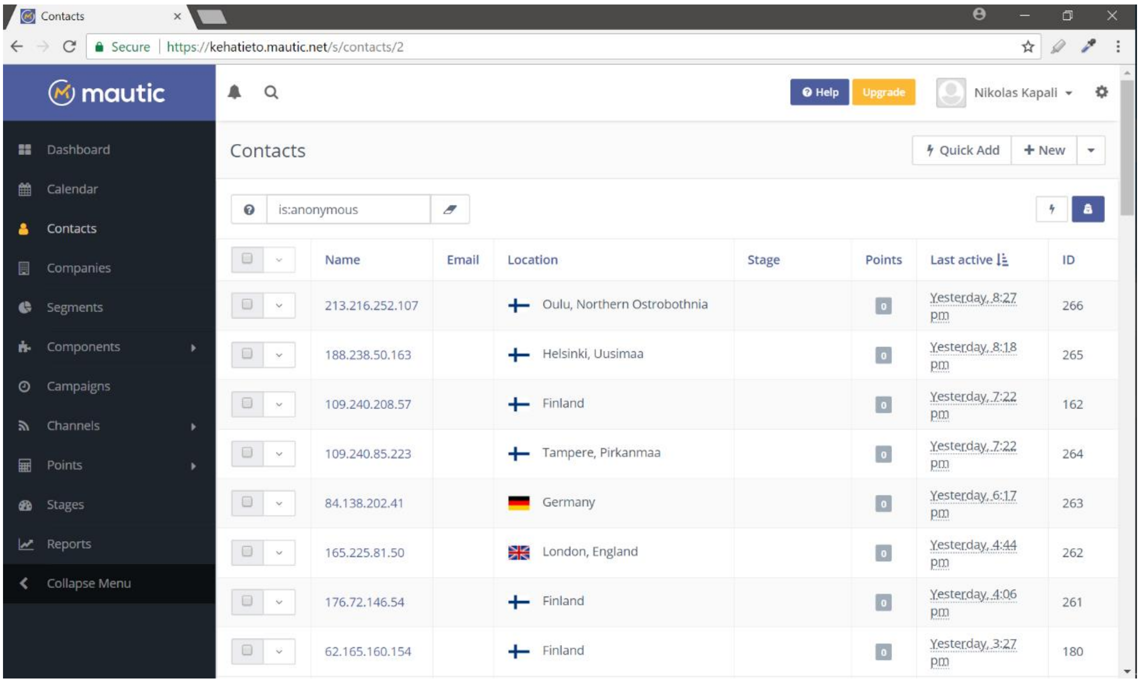

Figure 9 Listing anonymous visitors

With the cookie method, each time a visitor visits the website, a contact is created and a cookie is set for that contact that will serve for two years. Plus it is also used for identifying all the returning contacts. The cookies are helpful because they identify individual users by accurately tracking them. This way the system makes sure that the individual visitors that share same IP address can be traced and saved as contacts (Mautic documentation 2018, 17). In the case where users belong to same IP address, for instance visitors under Laurea UAS, with support of cookies it is possible to identify each individual visitor and save them as a contact. If cookies does not exist or if the user has blocked them, Mautic can still track and identify same contacts via tracking url from channels such as email and social sites.

Once a contact is created by Mautic, administrator can access various amount of information of the contact. These details include history of the user such as date of creation of the contact, web pages that the user visited and their geographical location. It also lists marketing lead scoring points of the contact and other detailed demographical and social information.

For the testing purposes only above mentioned methods were applied for tracking but Mautic offers other solutions as well. There are also other tracking methods that the system uses such as Tracking Pixel tracking that tracks through tracking image. Furthermore it is also possible to track contacts with Google Analytics and Facebook pixel (Mautic documentation 2018, 19).

4.4 Core Features

Mautic core features is a package of automated marketing components such lead creation, lead scoring, email and social marketing. In addition, the system enables segmentation of the leads, creation of components, channels and campaigns. Next topics elaborate each of these features.

4.4.1 Segmentation

Mautic consist of segmentation method for organizing contacts into different marketing segments. They can be created according to different marketing needs and are highly customizable. Saved contacts can be segmented with the use of filters, certain conditions that contacts must fulfil to belong to a segment (Mautic documentation 2018, 28-29). These filters can be created by using varieties of default fields that Mautic offers and are based on different kind of information's such name, location, city, company, email, social sites, industry, device type, job, title and plenty more. Further, custom fields according to necessity can also be created. Basically when segments are created using these fields users that fulfil the declared conditions will automatically be added to the segment.

When contacts are categorized into segments, marketers are able to create personalized and relative marketing campaigns for each segments. This is because the segments can built upon profiling customer behaviours that can pinpoint there interests and needs. For example, the systems tracks the users when they visit webpage and collects data regarding which pages they visited and how much time did they spent, how many times did they visit the page and so on. Analysing this data can reveal what kind of content the users are interested in and what their needs can be. In turn the marketers will have better insights about their contacts and deliver marketing messages and contents that are more closer to their needs and expectations. Furthermore, potential and existing customers will acknowledge the fact that the company knows about their needs and deliver only contents that matters (Lead management 2018).

Based on contacts behaviour or tracked data, they were divided into three main marketing segments and were segmented by using mainly two filters: visited url and visited url count. Simply when the contacts visited one of the pages assigned as in visited url filter and if the visit was more than or equals to three times then the contacts would be saved into the relative segment. For instance, the Web solutions segment was assigned with url http://www.kehatieto.fi/ratkaisut/jarjestojen-verkkoviestinta and when the contacts visited the following link enough Mautic automatically added them to the respective segment.

Other marketing segments were also created for functionality such as saving new contacts and those that belonged to a certain marketing stage. The segments such as First level contact is the first segment in the segmentation process, it was created to contain the users that only recently have been saved as contacts. System only has information regarding their name and email while no other tracked information such as their pages that were visited are known yet. After that information is collected, they would be moved on to other segments. Plus, for marketing stages three segments were created: Top of the funnel (TOF), Nurtured Leads (NL) and Marketing Qualified Leads (MQL). This was the process of saving contacts according to the lead points. Each contact's journey would start from TOF and when enough points are collected then they would be moved from NL towards the final stage MQL.

The image below provides a display of the mentioned segments.

Name	# contacts	ID
First level contacts (first-level-contacts) New contacts.	No Contacts	3
IT support (it-support)	View 1 Contact	5
Kilta solutions (kilta-solutions)	View 1 Contact	4
Marketing Qualified Leads (mql-segment) Segment for Marketing Qualified Leads	View 1 Contact	8
Nurture leads (nl-segment) Segment for Nurturing leads..	No Contacts	7
Top of the funnel (tof) Segment for Top of the funnel.	View 1 Contact	6
Web solutions (web-solutions) Segment for contacts interested in Drupal web solutions.	No Contacts	1

Figure 10 Mautic Segments

4.4.2 Campaigns

Campaigns are the most vital part of Mautic. They are the central element of creating automated marketing workflows and incorporates with all internal elements. It interacts with the organizations contacts and engages with them through different points such as via website, email or social media. Core features such as email marketing, lead scoring and lead nurturing are also incorporated with campaigns. A campaign is built by using one of two sources: Segment or forms, when a Segment is selected a campaign will be triggered on the contacts belonging to the segment. While a form will be use all the contacts that can access the selected form. (Mautic documentation 2018, 120)

A campaign can be triggered using two methods, it can be triggered based upon interaction with contacts such as when they execute a certain action such as visiting a page or spending certain amount of time on a page and more (Mautic documentation 2018, 120). For example, an email campaign has been applied which sends welcome email to all the new leads who submitted a form in the website and to score those leads if they opened the email or not. Another example would be a campaign that will modify the contacts segment based on their behaviour. A campaign triggered based on time are mostly the types that are based on email. And lastly, campaigns can be built using both methods at a same time as well.

As mentioned earlier, campaigns are a focal part of Mautic. It requires the workflow to be predefined which means what to do with the selected campaign source. Workflow can be created by using actions, decisions and conditions (Mautic documentation 2018, 122). This is the typical campaign workflow and once they are defined and the campaign is published then the campaigns respond automatically to contacts' interactions and behaviours within the timeline.

For the pilot implementation five campaigns are built which were all based on Segments. There were two emailing campaigns for lead nurturing. First email was the Follow up campaign for new users which was mentioned earlier as an example and the second was a marketing message. This message was used to ask the contacts about their journey so far and to test their participation or interest. The other three were about updating the contacts' stages. These campaigns monitored the lead scores of the contacts and the action was executed to update their stage when the condition required were met. The next chapter will be more descriptive about stages.

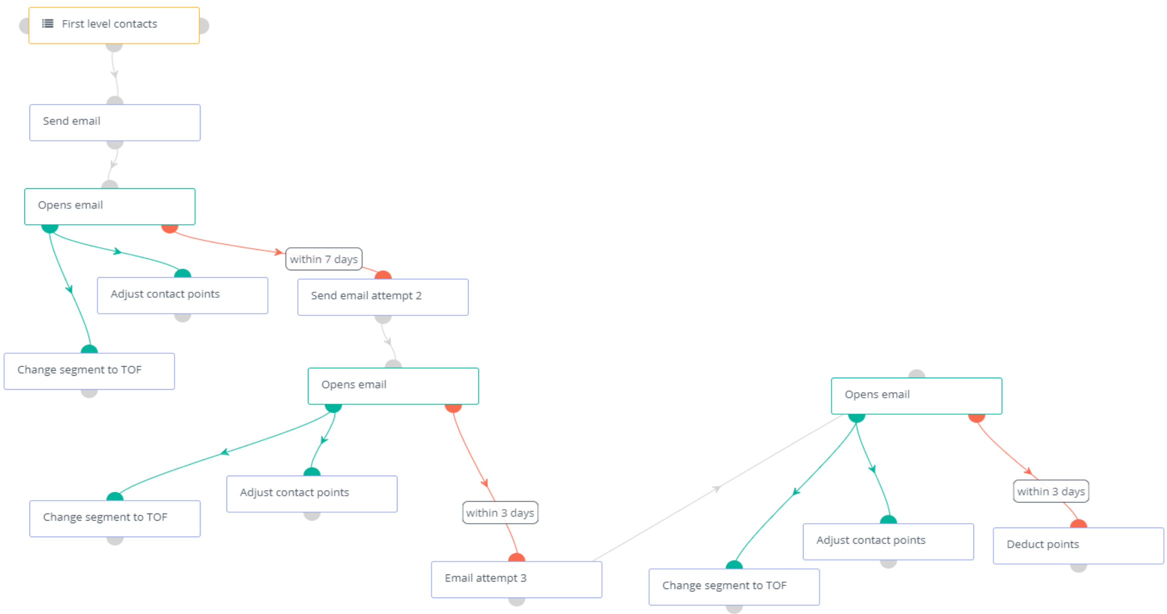

Figure 11 Workflow for Follow up campaign for new users

The image presents a typical workflow of a campaign in Mautic. The workflow consists of a source, actions, decisions and conditions. Actions are events that can be trigged by Mautic such as send an email, change a segment or a campaign, add or deduct points and more. A condition can be used to verify contact fields such as a valid email address, contacts name, device or segment. If the conditions match, certain actions can be executed like showing a form or sending an email. And lastly, decisions refer to the behaviour of contacts when they are being triggered with actions from campaigns. For example, here in Follow up campaign for new users is triggered once to all the contacts that are part of the First level contacts segment. The workflow starts with an action of sending a welcome email, this email is tracked by the system, so any decision taken by contacts can be used to trigger an event. In this case if the contact decides to open the email, Mautic executes two actions: first adds the contact to the TOF segment and secondly grants lead points him/ her. But if the email is not opened, it attempts to send the email twice. In both cases same actions are applied based on the behaviour. However, since the third attempt is also the last one so since there was no response from the contact, an action of point deduction is executed. Other negative executions can be executed as well like deletion of the lead.

4.4.3 Components

The components are the tools that are used to directly interact with the users and contacts. Mautic contains four types of components: Assets, Forms, Landing Pages and Dynamic Content. Mautic uses these components to extract data from the contacts and provide information to them.

Forms are used to gather or update user data such as user names, emails, an employer or a job field and more. In Mautic forms are used as a component for interchanging, forms allows users and contacts to provide information in exchange for access. These access are regarding event registration, downloading or accessing asset items or signing up for the newsletter. Mautic consists two types of form: standalone form and campaign form. The standalone forms are flexible forms where some actions can be selected upon form submission. These actions trigger when triggered can for example add lead points or send an email. A campaign form is a more restricted form as it cannot trigger those types of actions but they need to be added via campaign. However a campaign form can push contacts into a campaign while a standalone form can push contacts into segments. (Mautic documentation 2018, 64-66)

Mautic also consists of features to integrate and save social information of contacts. Social integration plugins can be enabled and configured then social links can be added in forms. This will allow the users to be able to register or subscribe via their social profile credentials. As a result contacts social information from Facebook, Twitter, Google, LinkedIn, Instagram and more can be saved and then they can be used for marketing purposes in social sites. (Mautic documentation 2018, 221)

Assets in other hand are valuable items of the organization and they have a high value content that is not usually present to all users in the website. These items can be a digital content in the form of a text document, videos, audio files or even a demo application. Mostly these assets are provided to the contacts via forms, they need to submit a form in order to download an asset. Another way is to include them as a download link with an email. (Mautic documentation 2018, 52-53). The assets can be provided to contacts whose needs or interests have been mapped through the gathered data. The benefit in this case would be that as the contacts needs are pointed out there is higher chances of success that the contact would find the item to be in his/ her interest. As a result, most probably it will yield a good response from the contacts.

Landing pages are another component which are used for creating special pages. These pages are built with purpose of requesting or CTA another components such as forms and assets. (Mautic documentation 2018, 75-77). Each landing page can have a specific CTA, for example, in this pilot project we have applied a form CTA where anonymous users are requested information for signing up for newsletter. These pages are made to serve or provide a solution to a particular problem or necessity the users or contact.

Last component of Mautic is Dynamic Web Content or DWC[8]. DWC allows to embed content dynamically on a webpage for both anonymous users and contacts. So different content are displayed to the users in a webpage depending on the type of the conditions they match. These conditions are defined by two methods: through Mautic filters or Mautic campaigns (Mautic documentation 2018, 60-62). In the first case filters are defined on DWC content while in the latter they are added to a campaign where a workflow process is mapped out and DWC contents are added. In both cases a common usage of implementation are DWC tokens. Tokens can be understood as a placeholder for the dynamic value that basically are a block of text for example, {contactfield=firstname} refers to the first name of all the contacts (Mautic documentation 2018, 63). Once DWC are created using mentioned methods, every time when the users meet the condition on a webpage, the respective DWC that matches the condition will be displayed.

Due to the time constraint not all the components could be applied to the pilot project. For this purpose only forms and landing page was selected and used. A newsletter subscription form was created, for the purpose of exchanging the user information such as their name, organization and email in return for receiving information regarding the organizations activities, solutions and events in the future. This form was added as a CTA element in a landing page, so every time the page was requested then the form would be available for the users. Here is the link belonging to the landing page: https://kehatieto.Mautic.net/create-contact-form.

In addition, the form also included actions that were executed after it was submitted. These actions were firstly to add the user of the submission to the first level contacts, the segment which acts as the base segment for new created contacts. Then it added a score to them for submitting the form. Mautic helps administrators to track the components, like how forms and landing pages are performing. For example, information regarding page views of the landing page in total and also of returning visitors and the total count of the form submission. This is very useful as we can try understand by comparing these values what can be improved or find solutions that work and track those that won’t work.

[8] Dynamic Web Content - DWC

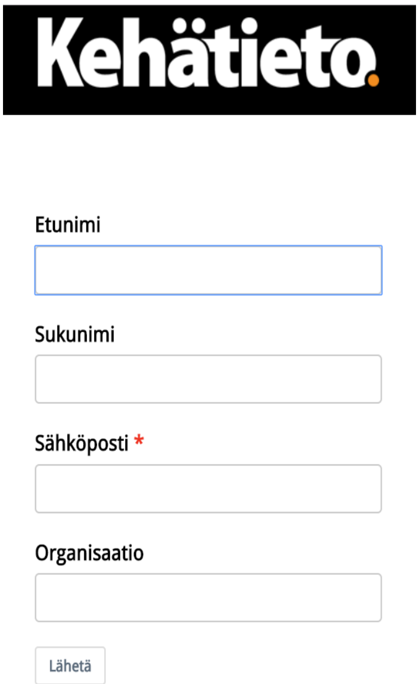

Figure 12 Mautic form included in

4.4.4 Channels

Channels is a core feature that mainly deals with mediums that is available for marketing purposes. In here the channels receive the tools or components that were created and integrate it with the available channels. Mautic consists of four default channels: Marketing messages, Emails, Focus items and Social Monitoring. For this project, all mentioned channels have been applied.

Mautic emails is a powerful tool that can send, track and report about the performance of emails sent via the system. They communicate with all the listed contacts through segments and campaigns. There are two types of emails in Mautic: Template email and Segment email. Template emails are used for creating general types of emails that can be implemented in multiple Mautic features such as components and campaigns and all users can receive these emails. (Mautic cloud free introductory webinar 2018). For example, it can be added as a form action: then an email will be sent after the form submission or it can be added to be triggered in a campaign. While Segment emails are emails that are assigned to a particular or multiple segments and only the contacts belonging to those segments receive the email. Another difference between these types are that Template emails can be sent multiple times to the same contact while Segment email is restricted to only send the email once per contact. They are also flexible as emails can be created and be published and unpublished at a certain time period, so the system will automatically publish the email and during this period emails will be sent and unpublished at the right time. (Mautic documentation 2018, 84-85).

In addition, emails can contain dynamic content as well. Contact information such as names or job titles can be included in the emails via tokens, and the receiver will receive emails with their information (Mautic documentation 2018, 63). For instance, emails can have the receiver's name, title and other relevant information. This type of email is stronger as they just do not contain vague titles such as Sir or Madam and also distinguishes between a proper marketing email and spam email. As a result, the personal bond between the organization and their contacts is strengthened. At the same time the emails are tracked, so system administrators will have information regarding metrics such as opened emails, replied emails, link clicks count, bounce rate, unsubscribed emails and contacts who opened the emails and which devices were used for accessing and more. This is a plenty of information that will help track the success and failure of the emails sent thus enabling the admins to improve their email strategy.

Figure 13 Example of subscription email

Focus item is a channel that has been implemented and is directly visible in Drupal site. They are important element of the automation system because it interacts directly with the external website. Mautic describes them as the hidden gem for their ability to interact with the website in multiple ways. Basically focus items enable to display items such forms, notification, links and more to the website. These items can also be modified to displayed as a pop up item, a sliding notification or a full overlay page. Further they can be select to appear in certain section of the main page such as top, centre or bottom of the page. (Mautic documentation 2018, 106-112). These items are highly customizable and can be styled according to the parent website, so when users interact with these elements they can feel they are not pushed into outside the content of the website that they are visiting.

Other components such as forms, landing pages and even emails can be styled in similar way. Own templates that can be created or imported and html contents can be added into these elements so that the Mautic contents can reflect the website style and patterns.

For this project a subscription focus item was created. This item was created to be displayed as a pop up item in the Kehätieto’s website. For the item to appear a JavaScript code had to be added into the website. The item was configured to appear when the users have spent 20 seconds and it contained a newsletter subscription link to a subscription form which has been mentioned in the earlier chapter. Once the form was submitted it would then not display to the same user unless their browser cache was cleared.

Figure 14 Pop up item applied to Kehätieto’s website

As social sites have become important aspects of marketing, so social monitoring is also available as a marketing channel in Mautic. By default Mautic allows social monitoring of Twitter but other services can be added as well. Although other social sites, such as Facebook or Google, are not included in Social monitoring the system allows another method to track the users. Facebook tracking pixel and Google analytics which tracks the user in Facebook and Google can be integrated via plugins. This way tracked data of respective contact can be imported from Facebook and Google.

Social monitors can be created for Twitter hashtag and mentions. The Twitter plugin has to be configured and access right has to be provided to access the account that is being monitored. Also the Twitter fields should be mapped with the Mautic fields, for instance, then Twitter name is fetched and it should be saved in the field ‘first name’ of Mautic. A new social monitor can be created by simply adding the necessary fields such as the Twitter handle name that in this case is the name of the Twitter account and then the desired social handle. Once those steps are concluded then Mautic will start to monitor the Twitter account. As a result, any time a Twitter user mentions Kehätieto or uses Kehätieto in the hashtag, Mautic will fetch the user information and create a new contact or update contact with the fetched information. This way the system is quite easily and automatically creating contacts who socialize or interact with Kehätieto in Twitter. (Mautic documentation 2018, 118-119)

Both Twitter monitors was applied for this project but due to the requirements this feature was not enabled into the website. As Kehätieto Oy is a B2B[9] organization, the social integration seemed to be not so effective implementation for their marketing purposes so it was omitted.

The last type of channel are marketing messages that are basically messages that has the ability to send messages through different channels. Mautic allows contacts the option to set their preferred channel of communication. (Mautic documentation 2018, 104-116). So depending on the contacts, they can have different preferences in channels for receiving messages, some might prefer an email while other might prefer a direct text message, a web notification or even a tweet on Twitter.

The system allows marketers to send marketing messages through any of the mentioned channels or all at once (Mautic documentation 2018, 104). For example when used with campaigns Mautic will determine by checking the contacts preference and send messages to them via their preferred channel. When system does not find any channel then the default channel will be used in this case, which would be an email. This is a very effective way of sending marketing messages as using the contacts preferred method and delivering content where they want them to be delivered.

4.4.5 Points and Stages

This section refers to lead scoring and managing different lead stages. In Mautic points can be assigned both positive and negative depending on their actions and also they can be accumulated. These accumulated points then can be calculated and then different events can be trigged. Points in Mautic is a statistical method of comparing contacts, this enables administrators the information of the contacts' situation in the marketing funnel. (Mautic documentation 2018,134).

Different actions can be created and when contacts execute those actions they will receive points for it (Mautic documentation 2018, 134). Points can be also assigned in campaigns when a contact executes a certain marketing action. For example in the project two individual point actions were created which are based on the high value content in the website: front pages stories and contacts page. Actions were created by tracking the behaviour of the visitor to those specific webpages and were triggered by the amount of visits and the time spent in the webpages. Basically when a visitor visits the webpage for total of three times and

[9] Business to Business – B2B

the total time amount is equal to 1 minutes then five points will be added to the contacts lead score.

Mautic allows also another feature known as points triggers. These triggers differentiate with actions, while actions are about lead scoring, triggers are more about aggregating those scores and then triggers an associated event (Mautic documentation 2018, 134-135). Administrators can create triggers for contacts that require minimum points and add an event like an email trigger, a contact trigger, a campaign trigger or an addon trigger. For example, three triggers are created based on the marketing stages and those are presented next. These triggers each require a certain amount of minimum points to trigger the event. And the events associated with them is about modifying the campaign of the contact. So every time the contact reaches the minimum points, the event will be triggered which means that the contact will be added to a campaign that responds to their current marketing stage.

On the other hand Mautic Stages refer to the marketing lifecycle of the contacts. Here administrators define their contacts' lifecycle similar to the marketing concept, so stages can be referred to as different stages in the marketing funnel. The goal is to nurture the each individual lead, push them to these different stages and finally convert them into sales ready prospects. (Mautic documentation 2018, 138).

In Mautic, as the marketing process was quite simple and straight forward only three steps marketing stages was built. Those stages were: Top of the funnel, Nurtured leads and Marketing qualified leads. To convert from one stage to another contacts needed to accumulate a certain amount of points or lead score. Basically a contact stared from the stage top of the funnel to nurtured leads and then finally to marketing qualified leads. These transfer of the stages is based on the marketing activities set in Mautic and responsiveness of the contacts. The details are discussed on the stages next.

The first stage is for all the newly created contacts by Mautic, they are fresh leads that have just being recognized by the system after their access to the Kehätieto's website. The stage required no points for contacts to be added to the stage, so every time a new contact was recognized and saved the system would update the segment as Top of the funnel and then the respective campaign is ran to update the stage. The second stage is the stage where leads have been started to be nurtured and are at the middle point of their customer journey. The systems knows about the contacts' behaviours and have provided with lead points for visiting high value contents, form submissions and email responsiveness. For the contacts to belong into this stage, he/ she through their marketing journey must have acquired total of 50 marketing points. Then the event is triggered to update the segment of the contact to a Nurtured lead segment and again campaign is triggered to update the stage.

Lastly, the last stage is about those nurtured leads who have completed their marketing journey and are ready to be approached by the sales department for possible sales opportunities. This stage requires that the contacts have sufficiently been nurtured with contents that are according to their interests and needs, they have participated in marketing campaigns that they belonged. As a result they have accumulated enough points that would be enough for sales representative to contact them personally. Similarly to the nurtured leads stage, this stage also had a minimum points requirements that was set to 100 points and then contacts who accumulated the required point would trigger an event to update their stage.

The stages that were created for the purpose were very simple marketing stages. The decision was taken due to fact of the scope of the thesis. As the main purpose was to study Mautic and its core feature for the pilot implementation, the author did not want to enlarge the scope by investigating Kehätieto’s marketing practice. Instead a simple marketing funnel concept was applied with the view that it could be improved in the future.

4.5 Obstacles and surprises

There were many obstacles and surprises during the course of this project. One of the main and unexpected obstacle was a server configuration. This problem was quite unexpected and out of my boundary. As the author did not have enough skill to configure server for Mautic, the role was passed to one of specialist in Kehätieto Oy. But in the first setup there were server configuration problems that were not expected. The research and problem solving took quite much of my time. The main problem was that the development environment and Mautic recognised local IP address as the main host rather than the Mautic domain so the Drupal site could not connect with Mautic domain site. After some time it was found out that the problem was due to how the Mautic was hosted in the server. So in order for Mautic to run normally it had to be setup again in the cloud server separately. Second attempt to install and run Mautic under company’s own cloud server also was unsuccessful. So due to the deadline and scope of thesis it was decided instead to use Mautic cloud version.

Solving the setting up of Mautic created some issues that took time and effort to be solved. This delayed the project deadline. Another obstacle was to manage work and the project together.

5 Pilot project and results

The Mautic pilot implementation was integrated with the main Drupal site kehatieto.fi on 15th of March 2018. The Mautic features that were built and tested on test site was finally integrated with the main site. The data was collected for about two weeks since the published date until 28th of March and presented in this report. Due to the deadline of the thesis the span of time could not be longer.

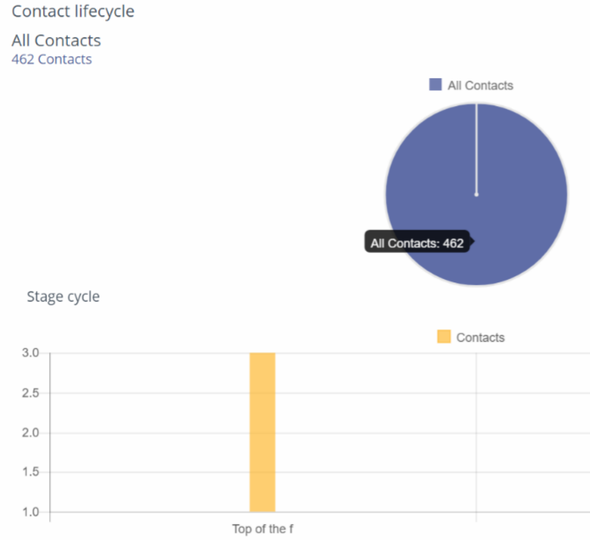

Figure 15: Leads generated by Mautic

During those two weeks, Mautic has been successful in monitoring and executing Mautic activities on the site. It has tracked the visitors and accomplished creating new leads. In total 462 anonymous contacts were created which were mainly from Finland and USA while others belong parts of Europe and Asia. However, these leads mainly remained anonymous and did not convert into contacts. Only four leads submitted the subscription form and converted into contacts. According to the statistical report it shows that visitors viewed the pop up focus item 384 times while only 27 clicks were made to the subscription link.

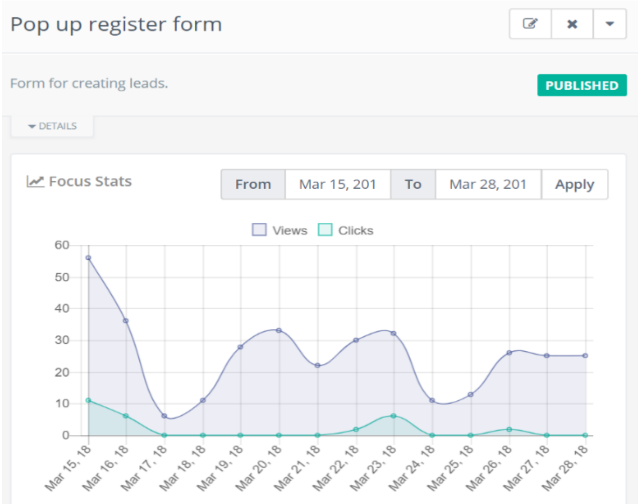

Figure 16: Pop up for registration form

Additionally, out of those 27 clicks only four submissions were made. Here we can make conclude that the process of creating contacts was an unsuccessful attempt. Due to statistics we know that both the pop up and the submission form were not able to trigger enough interest for subscription. Specially in case of the pop item, where only 0.7 percentage of visitors that viewed the item pressed the link. The following two to reasons should be considered for the performance of the pop up item. First, the message in the pop up item according to marketing practices was ineffective and second that it was due to the visitors lack for interest. As this was the first attempt for applying subscription feature, it could be that we need to test more and experience which messages are most effective while pin point those types that don't work. Also due the fact that as the company is a B2B organization, may be a different approach needs to be developed as to trigger the visitors interest, as they usually represent organizations so maybe they are reluctant and need more encouragement or different marketing technique to subscribe than compared to normal consumers.

The rest of the features such as lead points, stages and email marketing functioned well. Some of these functions only operated for known contacts such as email marketing but they functioned correctly. These features operated automatically and actions such as sending subscription email and adjusting leads points and stages were triggered as described in the campaign workflows.

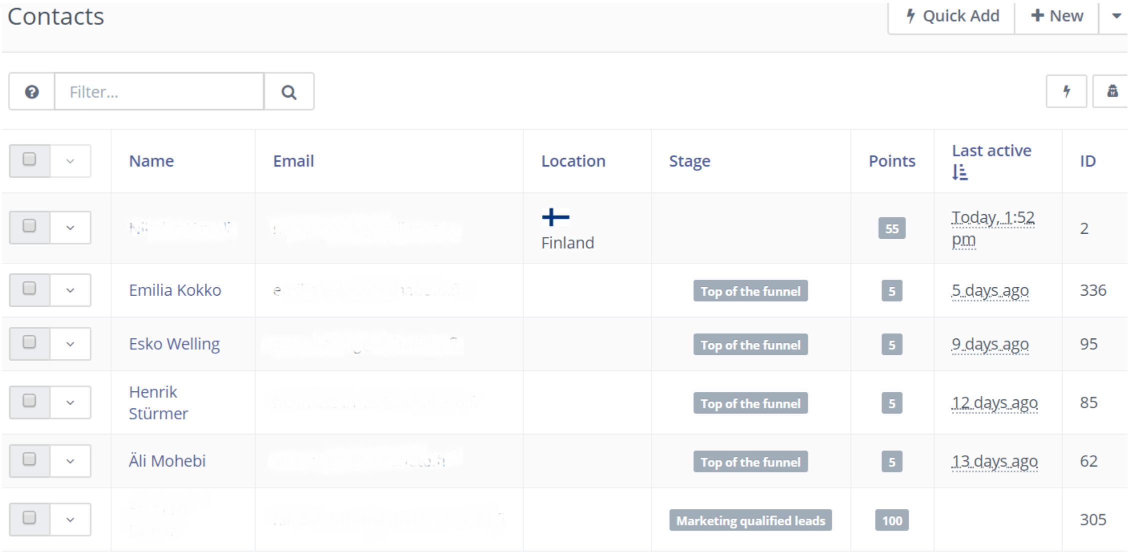

Figure 17: Mautic contacts

6 Conclusion

Implementation of marketing automation system is a time and resource consuming process. Both technical and marketing competences are the basis of effectively applying marketing automation. As marketing automation is the technical implementation which applies marketing principles, it involves researching existing marketing structure of the organization and planning an suitable implementation accordingly. This requires collection of different marketing information regarding marketing strategies and methods, channels and resources of the company and knowledge about their customer's needs.

The author considers that the pilot implementation has been successful from technical perspective which was also the main goal. However, due to the time constraint and the scope of the thesis it can be argued that in marketing terms, the implementation lack the results. For instance, it would have been better to implement more marketing campaigns and engage contacts and enhance their marketing journey. More lead points could have been distributed and the contacts could have been lead through all the marketing stages. As a result, further data could have been collected and presented regarding the performance of those campaigns and statistics about the leads that converted into prospects that contributed to the business.

Through this thesis the author has carried out thorough research on MAS and also has managed to test its capabilities. The data collected from the pilot project have provided Kehätieto Oy the knowledge regarding the role and capabilities of MAS. The objectives was fulfilled by covering the technical aspects of implementing MAS and testing different features that it has to offer. The results points out that MAS is a strong platform that offers great benefits to organizations by providing solutions to many of their digital marketing problems. Through the pilot project, it can be considered that MAS is a viable service prospect for Kehätieto Oy. However further research must be conducted and the company should invest in acquiring further skills and expertise before a productive MAS service can be launched. This is due to the fact that the pilot project does not provide any information regarding as the amount of sales ready leads and the amount of customers generated. But the ground work has been built which has opened path for further development and testing of MAS. So the author suggests that Kehätieto to work upon this built knowledge, the optimal case would be to conduct a real life pilot project with one of their client company. This would provide information that lacked in the pilot project and thus would provide better knowledge if there is a prospect in offering a business solution based on Marketing Automation. Thus, in the future the author hopes that Kehätieto Oy with the experience from this and future work can offer a suitable tailored service to their client organizations.

This project has been a very good learning experience. Through research the author was able to understand the topics such as different types of marketing strategies, about marketing automation and how they are related for optimization of digital marketing. Finally, it was challenging and also rewarding to work with Mautic MAS and build the pilot implementation.

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Figures

Appendices

Appendix 1: Interview with the company's representative

1. What are your expectations from the pilot project?
   The main expectation is to monitor the company's website and track individual visitors and their behaviours, so that marketing automation features can be tested on these users. For this purpose, Marketing systems needs to be integrated with Drupal site.

2. What are the main requirements for the project, could you mention important features that should be implemented?
   The most important feature that pilot should consist are: email marketing, leads generation, marketing campaign. These features should be automatic, like sending emails and creating contacts when users visits the website. It should be possible to track emails. For example, the system should record email performance, metrics such as email and link clicks should be available.

3. What would you consider other sub requirements?
   In long term our goal is can integrate Mautic system with our CRM, so that information can be shared between these two systems. So, if it is possible then, it would be nice to that this can already be tested. However, it is not the main priority for the pilot. Other interesting feature would be display specialized contents to users, for example the system is able to display different content based on the users tracked history.

   However, these are only optional requirements and we are hoping that basic research on the topic is done.

4. About tracking users and their behaviours, could it be possible to define methods that could be used to categorize users. Can categorization be made with high value contents or location?
   Yes, the method to categorize users should be based on high value contents of the website.

5. Could you mention which are those high value contents?
   Yes, they are definitely regarding our services. Kehätieto Oy offers three types of services: CRM solution that is known as kilta, Web solutions in Drupal CMS and IT support. So according to user behaviours they should be categorized into these three types.

6. What are other valuable contents of the website?

They are the contact page, where they will find information to contact our marketing and frontpage stories. These stories serve as testimonials and they inform the visitors of our past projects.

7. Now about marketing, in brief how is the marketing process in Kehätieto Oy?
   Our marketing process is direct and simple. We get our clients from a project portal where our sales representatives communicate with them via emails and other channels.

8. How about the customer journey, how long is the process? are they educated before they become clients?
   Yes, we send them newsletter related to past projects and communicate with them but that’s it, the process before a potential customer decides to convert into customer is short.

9. What types of marketing campaigns does the company pursue?
   We have campaigns such as having presence in social media, mostly twitter and few other small campaigns but as we are mostly B2B, business to business organization there has not been yet needed investment for larger marketing campaigns.