

Laura Invenius

# Automating Lead Creation in Tradeshows

Event tool implementation in Marketo-SalesForce architecture

Helsinki Metropolia University of Applied Sciences

Master of Business Administration

Business Informatics

Thesis

05.11.2017

Author(s) Title	Laura Invenius Automating Lead Creation in Tradeshow
Number of Pages Date	38 pages + 1 appendice 5 November 2017
Degree	Master of Business Administration
Degree Programme	Business Informatics
Instructor(s)	Pia Hellman, Principal Lecturer Geoff Dennis, IT Head
<p>The objective of this study was to automate the lead creation in Marketo-SalesForce architecture using the event tools that had been selected for customer and resource registration and lead creation. The case was built for Nokia, headquartered in Finland and participating in over 100 events on annual basis.</p> <p>Qualitative research method was used in this study. The current state analysis was based on interviews with marketing and sales representatives. The author had also a possibility to observe the lead flow in one of the biggest tradeshow.</p> <p>In the interviews, questions about the current method and future possibilities were asked. For the theoretical background, lead definition and management were studied. For understanding the lead flow, the customer journey blueprint and the theory for system and tool integration were investigated.</p> <p>The result of the study was a recommendation for lead definition that would also improve lead quality. The automation of the lead creation process, together with system integration was also planned.</p>	
Keywords	CRM, lead, marketing automation, marketing program

## Contents

1	Introduction	1
1.1	Overview	1
1.2	Case Company	2
1.3	Objective and Scope	2
1.3.1	Delimitations	3
1.4	Key Terms	3
1.5	Thesis Outline	4
1.6	Research design	4
1.6.1	Current state analysis	5
1.6.2	Conceptual framework	6
1.6.3	Solution proposal and validation	7
2	Current state analysis	7
2.1	Current tools and process in use	8
2.2	Strengths	9
2.2.1	Regional marketing	9
2.2.2	Sales	9
2.2.3	Technology marketing	10
2.2.4	Event marketing	10
2.3	Weaknesses	10
2.3.1	Regional marketing	10
2.3.2	Sales	11
2.3.3	Technology marketing	11
2.3.4	Event marketing	11
2.4	Key findings	12
2.4.1	The lead definition and quality	12
2.4.2	The automation of the process	12
2.4.3	The system and tool integration	13
3	Existing knowledge	13
3.1	Lead management	14
3.2	Service design	16
3.2.1	What is Service design?	16
3.2.2	Customer journey	17
3.2.3	Service blueprints	18

3.3	The information architecture	18
4	Building the proposal	20
4.1	Introduction	20
4.2	The lead definition	21
4.3	The lead quality improvement	22
4.4	The automation of the lead creation process	23
4.4.1	Enabling lead creation from event reservation	24
4.4.2	New segments and growing the business	27
4.5	System integration	28
5	Proposal validation	29
5.1	Introduction	29
5.2	The lead definition	29
5.3	The lead quality improvement	31
5.4	The automation of the lead creation process	31
5.4.1	New segments and growing the business	32
5.5	System integration	33
6	Conclusions	34
7	Discussion and recommendations for future	35
	References	38

## 1 Introduction

### 1.1 Overview

This study will research how to integrate Nokia's recently purchased event tools to Marketo-SalesForce architecture. This will automate the lead creation, enable stand personnel to understand the status of the visiting customer and eventually make fast decisions if this lead can be contacted by sales or should be nurtured further. The result should be a more efficient lead creation process at the tradeshows, draft leads being created already before the tradeshows with existing customer data and taking advantage of the information already existing in CRM system.

In B2B marketing, tradeshows, webinars, roadshows and other events are usually the most expensive marketing investment. Not only from content perspective but from resource perspective as well. In Nokia, multiple event tools, together with paper leads and data formats complicate lead to opportunity process and fragment company network architecture. The quality of leads varies and causes inefficient manual work that slows down the lead funnel.

Not only for the company, but for the customer as well, situation is challenging. Once he visits Nokia at an event stand, he usually meets demo presenters, subject matter experts and other people he hasn't met before. The stand personnel don't know the customer, so he is treated like a new contact. Instead of explaining to stand personnel what is his company status and what he would like to learn, this could be avoided with a proper planning and integrating customer data with tradeshow offering.

An efficient and automated lead process is a new key to B2B company's success today. The wealth of information and marketing that people face today makes it hard for companies to really sort out which ones are the sales leads that they should put their effort into. Cold calling, paid advertising without segmentation and tradeshows with no thorough follow-up could be afforded 10 years ago, but no longer.

Today's trend is to automate marketing activities as far as possible in sales funnel and offer only high-quality leads to sales, so that they can use their time well. B2B buyers

gain in this trend as well: if it is noted that you are not really interested in, you won't receive a random call to understand your needs, the seller already knows them.

This study explores how to integrate current event tools to Marketo-SalesForce architecture in order to automate the lead creation, enable stand personnel to understand the status of the visiting customer and at the end make fast decisions if this lead can be contacted by sales or should be nurtured further.

## 1.2 Case Company

Nokia is a multinational communications and information technology company, headquartered in Finland. It has got seven business groups: Mobile Networks, Fixed Networks, IP/Optical Networks, Applications & Analytics, Global Services, Nokia Bell Labs and Nokia Technologies. Nokia Technologies develops and licenses technology.

The main customer groups are communications service providers, governments, large enterprises and consumers.

Net sales in 2016 were 23.6 bn €, gross margin being 35.8%. At the end of 2016, Nokia had 101 000 employees in more than 100 countries.

Marketing and sales functions across the business are common and there are technology experts in both marketing and sales. Marketing has got global teams in content creation, marketing technology and event administration. Local marketing teams support local sales in event implementation, lead qualification and campaign identification. Sales is organized by key accounts, technology and region.

## 1.3 Objective and Scope

The objective of the study is to automate the lead creation in Marketo-SalesForce architecture using the event tools that have now been selected for customer and resource registration and lead creation. These tools have not been integrated yet in the overall network architecture frame and it hasn't been specified how this can be done and how could it simplify the lead process. Also, paper leads are still in use.

The output will be an automated lead creation process, possible system integration and simplified network architecture frame.

The goal is to remove the need of manually collecting leads on paper, typing them into an Excel file and then sending them over to lead qualification team. This process phase is usually done by Events team. Customers are already registered to different events, so same data could be used when converting these contacts into leads. Also, Nokia already has a lot of data about existing customers and this data could be beneficial when qualifying leads further in the sales funnel.

The target is also to study the integration of different marketing applications and how such integration could simplify the lead funnel, benefit sales and marketing and serve the customers better.

#### 1.3.1 Delimitations

During the research phase, it was not possible to interview customers. Their view is not included in this work. It would have been beneficial to understand the current process from their point of view and then research if they found it beneficial with the new approach. Unfortunately, this was not allowed and therefore the research and evaluation has been done completely inside Nokia.

#### 1.4 Key Terms

Key terms that will be used in this study are:

CRM: Customer Relationship Management system - a system to manage business relationships, includes data about the accounts and contacts to do that

Lead – sales lead is created when customer or prospect shows interest towards a company or a product and sales should qualify this need

Lead funnel – a funnel that includes sales leads

Marketing automation – a system that enables automation of certain marketing activities like analytics, e-mailing or sales lead qualification

Marketing program – marketing automation program that has been programmed to conduct marketing activities in certain order at defined intervals

Customer journey – customer touch pointing company physically or digitally

Segmentation – dividing similar customer into segments that enable targeting these customers with similar marketing activities

### 1.5 Thesis Outline

Current state analysis will be done by interviewing 5 Nokia employees from marketing and sales. Depending on their expertise and field of work, the analysis will concentrate on current process, used methods and tools, weaknesses and strengths they have noticed.

As a theory base, I will use the lead process together with a selected service design tool. This tool will be customer journey where it considers different journeys (event types) that customer faces and how does it affect the lead funnel, lead type and data flow. On top, I will also study marketing technology integrations and their benefits.

Based on findings I will build a solution and this solution will be validated in a series of meetings with event team, lead team and sales.

At the end, I will have recommendations for future.

### 1.6 Research design

The research has started with a current state analysis and based on findings, a theory framework has been decided and studied. After that, an initial process and solution was drafted, which was then validated in different meetings, leading to final decision of needed actions and approach.

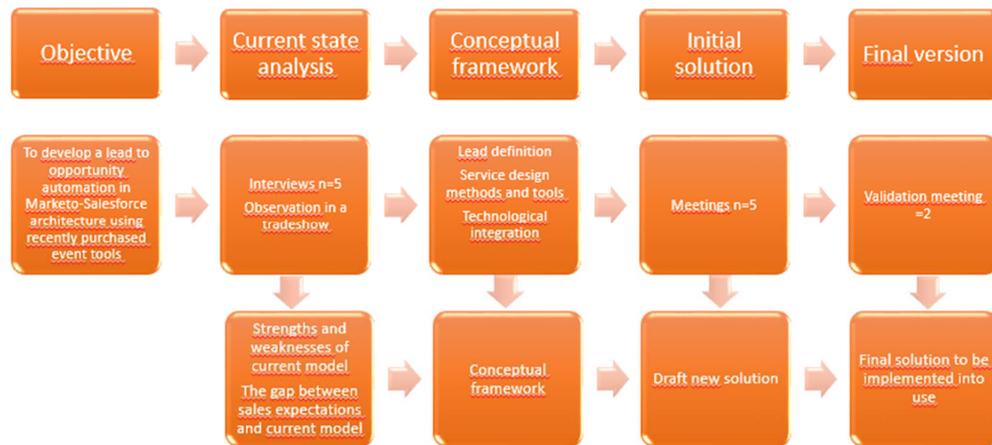


Figure 1. Research design

### 1.6.1 Current state analysis

Current state analysis was done by interviewing 5 persons by phone and recording these interviews. These persons were from different parts of the organization and had different roles in events and in lead process. All interviews were conducted during January – March 2017. The recorded interviews were transcribed and detailed results are available in this thesis under current state analysis, by interviewee role.

One interviewee was from event team, who takes care of event arrangements and lead file creation after the show. This person is in United States and is a team leader. She also works with different event tools and is responsible for selection, purchase and implementation.

One interviewee was from regional marketing, who receives the leads after the tradeshow and qualifies them together with sales. He also hosts the customers together with sales at the event stand or works as a demo presenter. He is located in Europe and is responsible for one of the biggest service provider customers.

Two interviewees were from sales, but had different roles. Another one works in sales operations, with CRM system, sales process and leads, another one in partner sales, being responsible for sales generation. They are both located in Europe but have global responsibility and visibility.

The last interviewee works in technology marketing and has global responsibility for marketing program creation for global partner network. She has also a long history with communications and events.

Current state analysis includes results of the interviews, documented per persons role in organization. The questions asked were grouped to four different entities. The first entity was about interviewees role in organization and his knowledge about the current process and tools. The second entity was about the current state, strengths and weaknesses. The third entity was about visioning the future and what could be the possible scenarios. The fourth entity was sales related questions and how are they working in events and with leads currently. The sales related questions were also asked from marketing to check how familiar they are with end-to-end process.

As a researcher, I also had a possibility to participate one of the biggest tradeshow, Mobile World Congress in Barcelona, in February 2017. I spent three days observing the event flow, studying the event tool functionality, checking the lead data and viewing different roles of Nokia people at the event stand. I also studied customer data used during the tradeshow and listened in the back office the discussions between customers, demo presenters and sales.

### 1.6.2 Conceptual framework

Based on the interview findings and my own learning at the event stand, I could identify the main challenges that needed a solution. I decided to concentrate on lead definition, customer journey and system integration. All these topics needed to be studied further when thinking a proposal to be presented and what kind of changes were possibly requested.

For lead definition, there is no one correct answer, but it is something that always needs to be studied based on company status, customer segments and needs and used process. The definition that has been widely used is called BANT, but for this study, I found a theory called FAINT, that matches better the needs and challenges.

Service design, customer journey and blueprint used for identifying customer journey are recent tools and methods for understanding how customer touches company in

different phases, what is his journey, what is the information he needs in different phases and how those needs should be addressed. Customer journey blueprinting helps to understand the lead funnel better and takes customer into the center.

System integration, data architecture and tool implementation learnings were needed to understand what is the best method for implementing these tools together, what needs to be understood and taken into consideration and how does it need to be done. Marketing technologies haven't been integrated in a systematic approach during the last couple of years. Only recently this has started to create attention, because even small marketing teams might use 5-10 different tools in their daily activities.

### 1.6.3 Solution proposal and validation

The key findings were discussed in several meetings with key counterparts. The new theories were also presented. It was decided to draft a new solution based on these key findings.

During the study, a critical error was done with data structure in a big tradeshow, so already during this study it was decided that system integration needs to happen, to correct the data structure and avoid such errors in the future.

The lead definition and lead creation automation were proposed and validated after that decision. The new lead definition wasn't accepted, but the lead creation automation will be done as part of the system integration.

## 2 Current state analysis

The current state analysis has been done using qualitative interviews and observing tool usage and event flow at a tradeshow in February 2017. First, I describe the current tools and process in use, then introduce the results of interviews. Interview results are presented by role and divided to strengths and weaknesses found during the interview. At the end, I introduce key findings.

## 2.1 Current tools and process in use

Nokia participates approximately 200 tradeshows annually. At the tradeshow stand, there are different ways of communicating with customers. First, there are demos that demo presenter shows to customers as scheduled beforehand or ad hoc when somebody walks to event stand.

There might also be meeting rooms that can be reserved beforehand. If meeting rooms are available during the tradeshow, any ad hoc meetings can also be organized. Lastly, there are also meeting rooms that are reserved for expert talks. These expert talks can be reserved and usually they are the most popular activity at the tradeshow: private discussion with a customer directed to his specific need.

All these resources are booked before the tradeshow using a specific meeting reservation tool. Sales people need to specify:

- Account
- Contacts/persons from that account
- Resource need
- Time and date

They also need to answer to preliminary BANT questions (budget, authority, need, timeline)

- Customer opportunity budget
- Authority – is the contact decision maker or not
- Need – why is this being reserved
- Timeline of a possible opportunity

Once customer arrives to tradeshow stand, he contacts reception, the reservation is being checked and account manager comes to pick up his customers.

If customer visits a demo, possible sales leads are collected on a piece of paper. The demo presenter writes down:

- Account
- Contact name and e-mail address

- Size of opportunity
- Timeline of a possible opportunity
- Specific customer need

No sales leads are being collected in meeting rooms. Those are sales meetings, so they are not considered as marketing lead generating meetings. In expert talks, sales leads are also collected on paper using the same paper form as at the demo stand.

After a tradeshow, somebody from event team types in all sales leads to an Excel file. This Excel file is a template that can be directly uploaded to CRM system. Sales leads are sent to regional marketing teams. They organize a meeting with local sales teams and discuss together which leads will be accepted and which ones need more marketing support before converting them into an opportunity. This process usually takes at least a month.

## 2.2 Strengths

This chapter includes feedback received from marketing and sales considering current state. Feedback was collected in 1-2-1 interviews.

### 2.2.1 Regional marketing

80% of the sales leads are ongoing businesses and projects. Targeting is successful and meeting at the tradeshow supports ongoing business activities.

The current process is working well: it is flexible and requires minimum effort from all parties. Sales need to make a reservation online, but they don't need to specify the reasoning for resource need.

### 2.2.2 Sales

Ad hoc meetings can easily be organized: customers that walk by the event stand can get a demo presentation without any reservations. For demo presenters, it is easy to make few notes on the visit and somebody types in the data into CRM system.

The new SalesForce CRM system that is being implemented, offers a good opportunity to improve the process. The lead to opportunity flow is well defined and supports also tradeshow leads. Additional parameters should be considered for the future process.

### 2.2.3 Technology marketing

Implementing buyers journey into current or improved process offers a good opportunity for all. Working with partners enables the company to expand further and increase the tradeshow capacity and the amount of sales leads.

### 2.2.4 Event marketing

Understanding beforehand the volume of customers and required expertise helps to resource the event stand correctly. Also, the first step into event automation has been completed and people are learning to use the tool.

## 2.3 Weaknesses

This chapter includes feedback received from marketing and sales considering current state. Feedback was collected in 1-2-1 interviews.

### 2.3.1 Regional marketing

The main weakness of the process for regional marketing is that it doesn't really provide sufficient background information for meeting the customer. Demo presenter or topic expert doesn't understand the big picture of the account based on the reservation. They are not capable of adjusting their speech to reflect customer needs. For this, the quality of the sales leads is questionable and should be improved.

Once making reservations, regional marketing already knows which leads are going to be accepted. Tool is only instrumental. Therefore, after the event, the marketing team selects which leads they are going to discuss with the sales. Rest of them they will keep in their laptop and offer them to sales only few months later.

The process doesn't allow regional marketing to view the sales accepted leads and opportunities and therefore they don't really know how much they have contributed to business. Sales has also different KPI's than marketing: the amount of leads they need to generate doesn't include tradeshow leads. For this, they might reject a lead and create it as a new lead later in the system.

### 2.3.2 Sales

The amount of marketing generated leads is very low and the quality is questionable. There are also completely new target groups that we don't know yet, but marketing should concentrate more on these, instead of current customers that are well known. Lead definition is changing, but sales is not aware how and it hasn't been discussed with them.

Sales teams are also very small, so lead scoring should be put in place and as part of the process.

### 2.3.3 Technology marketing

In smaller tradeshows, only sales is present and leads don't get reported to marketing. They are collected on paper and sales feeds them directly into CRM system or doesn't input anything. Not possible to track the success of the tradeshow and what has been the ROI.

In enterprise customer segment Nokia is not well-known brand. Tracking of leads should be improved so that we can increase the results. Also, in this segment, BANT lead information is very sensitive and customers are not willing to give that.

### 2.3.4 Event marketing

The current booking tool is an improvement but even though the data is requested beforehand, an Excel needs to be fulfilled after the tradeshow. Many manual steps cause extra work and reduce the resources from event arrangements. The big picture is miss-

ing and hard to understand why certain things need to be asked even though we know the customers.

## 2.4 Key findings

Having interviewed people from different parts of the organization, it results that the key points to be improved are:

- The lead definition and quality – BANT information is too sensitive to be asked and doesn't support the current business anymore. The lead quality needs to be improved
- The automation of the lead creation needs to be completed to remove manual work
- The tool integration needs to take place to enable the automation, to speed up the lead qualification and to remove the manual work

### 2.4.1 The lead definition and quality

The amount of marketing generated leads is rather low and bad quality. The percentage of marketing generated leads vs. sales generated leads is 10%. Even though the data for having high quality leads is requested in the reservation phase, that data is not used later, but asked again, perhaps with wrong details. This is frustrating also for a customer: he comes to a pre-booked meeting but still he is asked for account and contact details.

Asking BANT details is also not recommended anymore by sales and technology marketing. It is too sensitive to ask size of an opportunity or purchasing timeframe, especially if it is a new company and previously unknown contact.

### 2.4.2 The automation of the process

Based on the information that is already available in CRM system, the draft leads could be created before the tradeshow. The customer status is known and sales also knows which customers are planning to visit the events.

Once leads are being fulfilled at the tradeshow, it is still unclear if small requests by customer are fulfilled and by whom. If customer only wants to receive a whitepaper, who should deliver that and in which phase of the process? The lead nurturing is missing in the process completely and it is only concentrating on opportunity creation.

Marketo, marketing automation tool, has been implemented for marketing activities, but its role in sales lead process has not been benefitted. New customers, unfamiliar with Nokia brand, require also first nurturing, before they are ready to make a purchase.

There is also extra work of typing in sales leads from various tradeshows. Without knowing further details on lead process, event team is requested to fill in the template with handwritten data from lead forms. They already have the reservation data in their meeting reservation system, so it would be logical to use that system for improving the lead process as well. If no event team member is present, sales simply ignores this task and no reporting is done from those tradeshows.

Same data is also collected several times in different phases of the process. Even though the basic data set is requested once making a reservation, that is not benefitted when sales leads are collected.

Once sales leads are qualified after the tradeshow, if they are rejected, no reasoning is asked. It is challenging to follow the results and get a ROI on tradeshows.

#### 2.4.3 The system and tool integration

Improving the lead quality and automating the process is only possible if different tools are integrated and data structure harmonized. The data needs to be collected only once and it can be benefitted in different activities, different front-end applications and approaches. If different tools and applications are not integrated, the data is scattered and even false.

### **3 Existing knowledge**

After having done the current state analysis and identified what are the key points to be improved and recommended, I have decided to concentrate my studies of existing knowledge in three areas.

Firstly, in today's digital world, how is the lead defined and managed. Secondly, I wanted to understand the method for defining the customer journey through different systems, data needs and phases. Thirdly, I studied what needs to be taken into account once different applications and systems are integrated – is there some basic knowledge that needs to be taken into account before doing so and could that knowledge be used in future cases as well.

Based on current state analysis and existing knowledge, I started building the proposal, which is then introduced after this chapter.

### 3.1 Lead management

Lead generation from tradeshows and other events is the key topic in this work. There are many articles and books about lead management, lead generation tactics, lead definition and qualification. In this work, I concentrate on event leads and how to automate the flow to sales. According to Saget: "There are three fundamental reasons most companies invest in event marketing: 1. To inform, 2. To demonstrate, 3. To capture leads" (Saget, 2006, p. 136).

Schultz, Doerr and Frederiksen write that only seven letters matter to increase the revenue:

1. Number and/or quality of targets,
2. Number of overall leads,
3. Number of qualified leads,
4. Number of qualified leads converted to clients,
5. Revenue per client,
6. Revenue retention,
7. Growth rate per retained client

(Schultz, Doerr and Frederiksen, 2009 and 2013, p. 50).

Lead generation is one of the most important reasons to invest in event marketing. Either being there for existing customers and contacts or to find new, potential clients.

Once talking about lead generation, Schultz, Doerr and Frederiksen state that “proactively generated leads are 25% short-term, 25% bad fits, 50% long-term leads” (Schultz, Doerr and Frederiksen, 2009 and 2013, p. 243). This is the average they have found out without going into details of marketing tactics, quality or target groups.

Schultz, Doerr and Frederiksen introduce also three truths, stating that a steady lead stream is needed, no impulse buys take place and that complex, trust-based services purchases take time. (Schultz, Doerr and Frederiksen, 2009 and 2013, p. 257).

In B2B marketing, sales cycles are usually long. However, as Schultz, Doerr and Frederiksen state “The long-term leads often produce the best business”. (Schultz, Doerr and Frederiksen, 2009 and 2013, p. 246).

Hubspot, one of the leading marketing technology companies today, state that it is not enough to just create sales leads based on qualifying questions. There also needs to be a plan to nurture those leads further and build relationships for the future.

Schwartz, G. (n.d.) 4 Questions to Develop Long-Range Sales Leads [Online] Hubspot

However, based on this, they represent a new definition of a qualified lead. Marketing has been talking about BANT qualification for years (Budget, Authority, Need and Timeframe).

According to Schultz, Doerr and Frederiksen this definition is incomplete for two reasons. Asking sellers about budget often puts them into defensive mode. Usually, companies are also presenting new solutions, products or system at the tradeshow or only selling initial ideas, testing the market. For this, the customers don't have a budget but if the product is a good match, they should consider the purchase. For this reason, budget is non-existing, they couldn't be prepared for this. (Schultz, Doerr and Frederiksen, 2009 and 2013, p. 244).

For this, they are introducing a new model – FAINT. This stands for:

1. Funds – focus initially on buyers that have the financial capacity. They may or may not have a budget, but they have the overall financial wherewithal to spend. Sell where the money is.
2. Authority – Focus on finding the individuals who have the authority to make decisions on how to use funds. If the organization has the financial

capacity to spend if they found something to be worthwhile, you must deal with the people who have the authority to allocate said funds.

3. Interest – Generate interest from the buyer in learning what’s possible and how to achieve a new and better reality than the one they have today.
4. Need – Uncover specific needs that you can solve. They’re likely to be latent – hidden beneath the surface – but they’re there if you can uncover them.
5. Timing – Establish purchase intent and a specific timeframe for doing so. This can, of course, take a number of conversations, might involve a number of decision makers and influencers, and may take some time to do. Once you do it, however, you now have a qualified prospect and a real opportunity in your pipeline.

(Schultz, Doerr and Frederiksen, 2009 and 2013, p. 244-245)

Based on these theories, lead generation targets in event marketing could be finetuned to not only target leads in general, but to have leads that can be divided into two categories: short-term leads and long-term leads.

On top of this, short-term and long-term leads could be qualified using the FAINT-method, especially supporting the long-term lead idea where budget is not yet existing or clear, but funding is available.

## 3.2 Service design

### 3.2.1 What is Service design?

“Service design is all about making the service you deliver useful, usable, efficient, effective and desirable” (Stickdorn and Schneider, 2010, p.31). This is one of the academic approaches to Service design. Agency approach to the same topic states: “Service design is a holistic way for a business to gain a comprehensive, empathic understanding of customer needs” (Stickdorn and Schneider, 2010, p. 32).

Service design studies customer needs and implements then service design into processes, so that overall customer experience is improved and company understands customer requirements resulting in better business experience.

Five principles of service design thinking are that it is user-centred, co-creative, sequential, evidencing and holistic. (Stickdorn and Schneider, 2010, p. 34)

This means that service should be considered through customer eyes and he should be involved in design process. The service flow should also be considered from the start to the end and what are the key deliverables along the way.

### 3.2.2 Customer journey

One of the tools that is used in service design is called Customer Journey. As stated by Stickdorn and Schneider:

A customer journey map provides a vivid but structured visualisation of a service user's experience. The touchpoints where users interact with the service are often used in order to construct a journey – an engaging story based upon their experience. This story details their service interactions and accompanying emotions in a highly accessible manner

(Stickdorn and Schneider, 2010, p. 158).

Mager has written that: "The customer journey serves as the umbrella under which the service is explored and, with various methods, systematised and visualised" (Mager, 2009).

In this work, it is not allowed to interview end customers, so customer journey will be built thinking sales people as internal customers. The objective is to find a best possible process for making lead flow as smooth and effort consuming as possible. They can concentrate on selling, instead of gathering same data multiple times during the process.

As Stickdorn and Schneider write:

Identifying the touchpoints where users interact with the service is crucial. These can take many forms, from personal face to face contact between individuals, to virtual interactions with a website or physical trips to a building. Once the touchpoints have been identified, they can be connected together in a visual representation of the overall experience. This overview should be visually engaging enough to make it easily accessible to all, but should also incorporate enough detail to provide real insights into the journeys being displayed.

(Stickdorn and Schneider, 2010, p. 158).

For this, crucial part of this work is to create also a visual representation of a lead flow, so that different touchpoints are clear and all parties understand their role in the process.

### 3.2.3 Service blueprints

Service blueprints are usually created in a team to visualize the service touchpoints and the process behind. It easily reveals the gaps, identifies where double effort is done and how the flow can be improved.

Service blueprint is a good tool in service design and especially with customer journeys. It can be a visual representation of a customer journey. It should be updated time to time, especially when there are bigger changes in a process, in tool landscape, with customer interfaces or just on regular basis to understand if there has been changes that haven't been noted but maybe affect customer journey.

(Stickdorn and Schneider, 2010, p. 204-205).

Originally, the service blueprint has been developed by Shostack. The main idea is that it doesn't include only customer facing activities, but it also includes what happens in the back-office, service elements that are essential for the service.

Service blueprint should include service platforms, use cases, design plans and schedules as well, if such exists.

(Miettinen and Koivisto, 2009, p. 17).

Daniel Ewerman writes that blueprint should start very early before the purchase and end a long after the purchase. A detailed blueprint tells you the pain points and shows you step by step what happens from customer perspective. A detailed blueprint helps to put emphasis on weak points and solve the problems before they occur. (Ewerman, 2015, p.78)

### 3.3 The information architecture

Traditionally, marketing has purchased applications, platforms and tools when there has been a challenge or a problem to solve. If e-mail needs to be sent out, a tradeshow

registration done or a posting in social media accomplished. A systematical thinking across platforms has been lacking and the idea of sharing the data between different platforms has been missing.

Anne Kauhanen-Simanainen comments that the amount of data forces finally to concentrate on information architecture and systematic planning of data structure. (Kauhanen-Simanainen, 2003, p.13). She divides technical architecture from information architecture by specifying that technical architecture defines the technical entity and its different applications, systems and tools, whereas information architecture defines data pieces and their relationships to a logical and easy to understand entity. (Kauhanen-Simanainen, 2003, p. 21)

This thinking is only to be implemented in many marketing organizations. Systematic thinking has been lacking and only now many companies have noticed the increased amount of applications and tools and growing costs because of that.

Scott Brinker doesn't separate information and technical architecture but instead, he talks about platforms. Platform is a base in marketing, on top you can build layers. Platform is the standard and sets the well-defined borders. It represents a common set of services and support capabilities to things that are built on layers above.

Especially in marketing, platforms have three goals:

1. Reusability and flexible modularity – enabling layers being built on top of platform and taking advantage of what has already been built.
2. Next layer can grow and evolve independently – it is not dependent on other layers, but only on the platform. The coordination between layers is not needed, only with the platform – otherwise it will be too complex.
3. Encouraging following layers to be very different from each other. The platform is the foundation and sets the limits, but next layers can be very creative and different between each other.

(Brinker, 2016, p.226-230)

Brinker also points out that technology changes exponentially but organizations and people change at much slower pace. Therefore, the key is to simplify the marketing

technology landscape because we can't absorb everything. Important is to select those innovations that are the best fit. (Brinker, 2016, p.236)

In this study, I see Marketo-SalesForce as a platform that then also defines data structure. On top, it is essential to select layers that represent different capabilities. The Marketo-SalesForce platform is the foundation with well-defined datasets and layers above can take advantage of this data. To avoid complexity and over engineering, layers should be selected based on use cases and business benefits. The features and functionalities that are not used, should be sunsetted.

The event tool selected for this study, is a layer that has already been used, now it is time to integrate it with platform to harmonize the data structure.

## **4 Building the proposal**

Proposal is built based on current state analysis and existing knowledge about lead management and definition, customer journey blueprint creation and system integrations. The proposal is divided into four sections. First section is about lead definition, then I make a proposal about improving lead quality. After that I introduce the concept for automating lead creation, where customer journey blueprint is also used and at the end I propose a system integration.

The main objectives are to automate the lead creation, improve lead quality, remove the need for manual work from event team and define the building stones for marketing system architecture.

### **4.1 Introduction**

The recently implemented Salesforce CRM system and Marketo, marketing automation tool, that has been integrated with Salesforce offers a good possibility to improve the event lead process. The lead process needs to be automated using the architecture already in use inside Nokia. Salesforce CRM system includes account data, possible opportunities, contact persons and needed details to understand what is happening with that account and what kind of activities should happen next.

Marketo should be used for nurturing the customers that are not yet ready to buy or are interested in products, not yet in the market. Marketo can also be used for improving the lead qualification.

The event resource tool that is currently in use can be integrated into this frame and automate the process completely.

Once organizing a marketing event, customer data and activity history should be analysed beforehand. If it is a tradeshow where customers will be personally present, customer segments, purchase history and open opportunities should be checked. All this can be done with a help of SalesForce CRM system. Sales people are in regular contact with their customers and record every action with them. They should register their customers to the tradeshow and give pre-information what should be presented to them.

This will be beneficial also from resourcing perspective: once knowing exactly which customers presumably will visit the event, it is easier to decide which products and solutions should be presented and which message could be delivered to the customer once he is there.

This approach will optimize marketing planning as well – no tradeshow will be organized based on feelings. Instead tradeshow participation and content will be based on data: this is the number of customers we are waiting for and this is what we should present to them.

#### 4.2 The lead definition

As described earlier in this study, Nokia is currently using BANT qualification (Budget, Authority, Need, Timeline) in qualifying the leads. Once this information is available, the lead is ready for sales.

The current state analysis and new theories indicate that instead of BANT, the qualification should be changed to follow FAINT system as described by Schultz, Doerr and Frederiksen:

- Funds – if customer already exists in CRM system, funding and financials of the company have been checked beforehand. Therefore, no need to ask for existing budget. Once customer is interested in, he will find funding for the project or solution.
- Authority – if contact already exists in CRM system, usually title and authority are known.
- Interest – this is the piece of information that is revealed during the tradeshow. This might be a new thing to them that they haven't considered beforehand or new feature that now raised their interest. Usually customers say that they would like to receive a whitepaper or they would like to have a workshop.
- Need – based on account data – is this something that fits into overall understanding of accounts general status and account plan.
- Timing – based again on account data – is it doable immediately or might need more discussions.

(Schultz, Doerr and Frederiksen, 2009 and 2013, p. 244-245)

Using the data available in CRM system, would make a lead collection and creation more simplified. No need to ask for basic data, but instead using the opportunity to discuss things that matter most to the customer, at a moment that is good for this account. Only the outcome of this discussion should then be recorded in the system and passed forward for marketing or sales.

#### 4.3 The lead quality improvement

SalesForce CRM system includes information and status of customer accounts. The financial data, contact network and current purchases can be found in CRM and can be benefitted for improving and automating the lead funnel. Once customers are registered to tradeshows and other events, this data can be used to improve the planning, share the information with stand personnel and to automate the lead process.

Changing BANT to FAINT and using CRM data in preplanning means that leads created during the tradeshow are already highly qualified and can be directly given either to sales or marketing. The activity history a gives good indication if customer should be nurtured further on this topic – creating a marketing lead or if this is immediate need and sales should discuss with them further. No need to ask basic contact details when

previous data is combined and tradeshow activity planned beforehand. The person who is discussing with a customer can make a note in the system – only indicating the immediate need or customer requirement or simply a need to nurture further.

Schultz, Doerr and Frederiksen state that “proactively generated leads are 25% short-term, 25% bad fits, 50% long-term leads” (Schultz, Doerr and Frederiksen, 2009 and 2013, p. 243). In this case, it could mean that the success rate could be as high as 75%!

Of course, on top of customers that have already been pre-registered to the event, there will also be some number of visitors that visit the stand and there is no pre-indication if they will be good sales leads or competitors looking for information. Using badge scanners enables Nokia to register their basic contact information. If these badge scanners would be integrated to CRM system, it would be rather fast and easy to check if this company already exists in the system or is a prospect.

If they indicate a special interest, a sales lead should again be created. Because of lacking pre-data, a badge scanner should include lead qualifying FAINT questions: funding, authority, interest, need, timing. This prospect requires longer discussion, because he is new to the company and there is no pre-information available.

It might sound strange, but it might be useful to collect also competitor information. The topics they are following and contacts we manage to discover are a good source of information and gives a basic understanding in which areas do they find us as major competitors or threats to their business. Titles and positions of people visiting and looking for information might be interesting for different functions of the company. A strong interest of engineers and technicians might indicate that they are trying to find out technical details. Sales people might be interested in price structure and customers.

#### 4.4 The automation of the lead creation process

Implementing new lead qualification criteria, FAINT, and enabling the data usage from Salesforce are the first steps in automating the lead creation in tradeshow. Taking advantage of what is already known and combining that information with lead target data can automate the lead creation and make it very convenient for both sales and

end customer. Also, the objective of removing manual work from event team after the tradeshow when creating a lead upload file will be achieved with this activity.

This lead creation automation can be visualized with customer journey service blueprint. The blueprint helps in identifying the gaps and noticing what are the weaknesses that need to be worked further. It will also serve as a permanent document in processing the lead automation further and noticing the changes that are needed in the future.

As mentioned earlier, it was not possible to interview customers for this study. For that reason, the customer in the service blueprint is a Nokia sales person – internal customer in the process. The process flow should simplify also the sales process and need of internal work, time that is all away from customer interface.

#### 4.4.1 Enabling lead creation from event reservation

At the tradeshow, Nokia has several possibilities. Meeting rooms can be reserved for customer meetings, demos can be booked for a tour with a customer and a specific meeting room with a topic expert making a presentation can also be reserved. All these resources are booked with an event resource tool.

The information that is filled in once making a reservation can follow the data structure used in CRM system and working as a foundation for a new lead.

Before the tradeshow, sales person needs to register his customers. Each tradeshow will have predefined options for presentations and demos and sales person will select which ones his customers should see. The reservation will be created under the account in CRM system and customer contacts from that account, participating the demo or presentation will be added to the reservation.

This reservation will remain in CRM system under relevant contact in customer account. If there is an opportunity created from a sales lead, it can be linked to this activity, so that it is commonly understood how much return on investment this tradeshow generated.

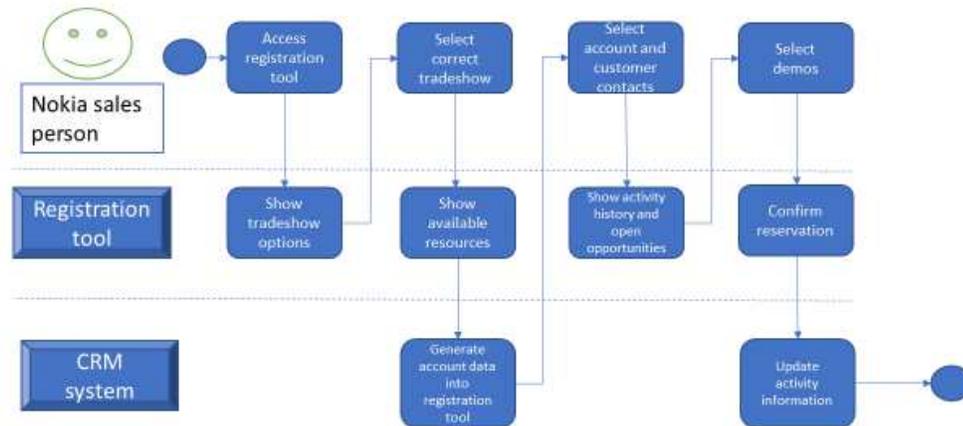


Figure 2. Resource reservation before the tradeshow

Before the tradeshow starts, presenters should familiarize themselves with preregistrations, customer activity history and any opportunities that are linked to these customers. They should discuss in advance what is the message that needs to be given and are there any specific points that should be taken forward.

Once customer comes to the tradeshow stand, his badge will be scanned and the registration tool will tell what are predefined options this customer should visit. If he is not escorted by a sales person, he will be escorted by stand personnel to correct presentations and demos. His activity history will be updated in the tool to include also those topics that he visited, even though they might not have been registered beforehand but came ad hoc.

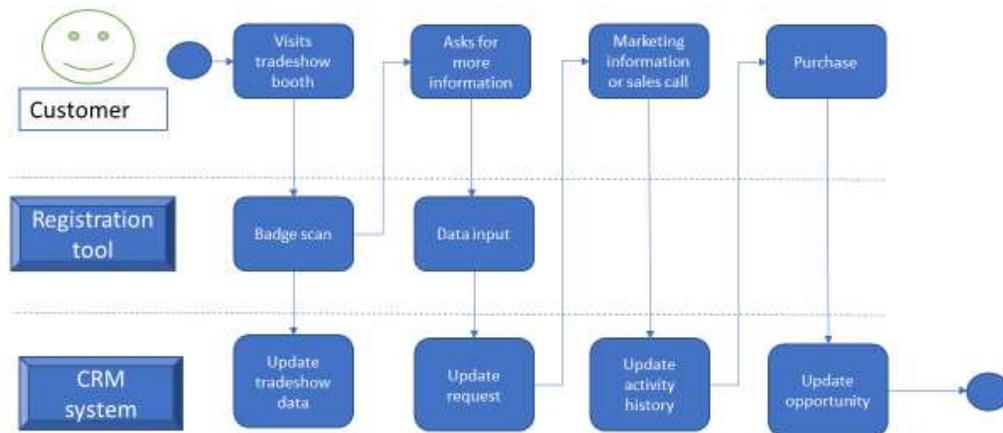


Figure 3. Lead creation at the tradeshow stand from a resource reservation

If customer expresses interest or says that he would like to receive more information, this information will be updated in the system. Based on this information, a lead will be created. This lead will either be marketing or sales lead. Here, the qualification will be based on FAINT system as described by Schultz, Doerr and Frederiksen. (Schultz, Doerr and Frederiksen, 2009 and 2013, p. 244-245)

As mentioned earlier, the basic data is already in the system and once customer is known, there is only a need to fill in the actual need of the customer or information what did the customer see, together with a proposal to transfer this interest to marketing program or to sales.

Besides traditional tradeshow, where customers are seen face to face, other event types should follow the same logic: roadshows, webinars, customer visits. These event types are easier to plan. Usually customers are invited to these events and we know beforehand exactly who will be participating. The whole event content can be targeted for their specific needs. The most important factor here again is to plan based on existing data and to register during the event what has happened and who has participated. These events can be tailored to suit specific needs – especially webinars can concentrate on one specific, even very detailed topic. Invitations can be sent to customers that we identify from CRM system based on their activity history.

#### 4.4.2 New segments and growing the business

Providing correct information to the customers and prospects, in the correct phase, especially when he is interested in and willing to receive it is especially challenging after the tradeshow – the usual approach is that customer receives “Thank you for visiting” e-mail with a link to website where all material presented is available. It doesn't consider what customer has seen during the tradeshow and if he has asked for something specific.

In this study, it is to be noted that even though sales leads are being created, not all leads will be good enough to hand over to sales. Therefore, in my proposal I also include a suggestion what to do when leads are not strong enough to be given to sales.

Especially with new segments, that have no history with Nokia, it is essential to nurture the contacts once initial contact has been created during the tradeshow. The contact record will be created with the help of event tools including information what prospect has seen and experienced. After the tradeshow, these new contacts can be added into a nurturing program that especially touches this target group with a content that they are trying to familiarize with.

In B2B context, it is quite frustrating for the customer if he needs to explain his basic needs and contact details every time he is interacting. The data that is available, needs to be benefitted and planned what could be the customer need to see and experience next. Therefore, marketing automation fulfils easily the needs of new contacts.

For existing customers, once customer has visited a tradeshow and seen something interesting, he of course wants to continue the discussion where it remained. He doesn't want to start from the beginning. However, he might not be ready to discuss with sales or product proposed is only in development. This gap can be filled in with an automated marketing program.

Customer can be a marketing lead and for this included in marketing engagement program. From CRM data and activity history it needs to be studied, what is his knowledge level. If he has already seen quite advanced presentation and is familiar with the basics, the discussion should continue from advanced level. Too often, companies have one engagement program per topic and all contacts that are included in this engage-

ment program are forced to start from the beginning and it takes weeks before they are mature and on the next level – maybe needing a sales contact.

Studying the data in advance and creating communication models for different customer needs is beneficial for the customer – he gets information that matches his needs and requirements in the phase that he is currently going through. Also, basic demographic data is already available, so no need to ask for it every time.

#### 4.5 System integration

The growing number of marketing technologies, different applications, tools and systems are making the marketing landscape very complex. The tradition of purchasing a new tool, when there is a challenge in marketing has led to a fragmented tool landscape, where tools are working in isolation, not benefitting the same data and resulting in outdated data and manual data transfers between systems.

In this study, it is easy to understand that Salesforce CRM system, as already integrated with Marketo, forms a platform for marketing activities. Salesforce includes essential customer data, purchase history, contacts, opportunities and customer segmentation. Salesforce is already integrated with Marketo, marketing automation tool, that enables new contact creation from website forms and marketing programs. This combination forms together a powerful system for framing the customer database to support the company strategy.

As proposed by Brinker (2016), there should always be a platform and on top, different layers can be added, that can be very independent and creative. Event tool is one such layer. It has already been tested as a standalone tool and integrating it now with Marketo Salesforce enables features that haven't been fully used before. Besides, it will also remove the need for manual work, when data transfers don't happen anymore manually with the help of Excel files.

The current setup of event tool doesn't follow the company data structure either, so by integrating it with Marketo Salesforce fixes the datastructure when datafields will be mapped between different systems. It will also help in filling in certain datafields automatically, instead of a need to copy same data to different systems.

## 5 Proposal validation

The proposal was validated and commented in informal discussions and meetings between sales, marketing and IT. Marketing noted the need to expand the approach also to other type of events, not only tradeshow. Sales would be interest in to include this capability in sales meetings. IT started validating the needed data flow.

Once validating the proposal, lead creation automation, lead quality improvement and the removal of manual work from event team were achieved. This study is also a building stone in defining a marketing architecture.

### 5.1 Introduction

During this year, once this study was done, there was a tradeshow with serious data problems. The demos and meeting rooms were reserved using an event tool, but because there was no data integration in place with CRM, it was possible to make reservations without any data validation. This caused serious errors in lead creation and generated a lot of manual work.

An event tool was used for reservations and lead information was filled in using the same tool. The outcome was an Excel file where account names were not correct, contact details were missing and BANT information was partially missing. The corrective actions needed to take place and two teams worked on that Excel file to manually correct the data and enable the data upload.

After that tradeshow, it was decided that event tool will be integrated to Salesforce and data mapping will be put in place. This means that tradeshow resource reservations will be done in Salesforce, under a correct account as proposed. The automation of the process has already started.

### 5.2 The lead definition

The lead team that is responsible for lead process, qualification and definition has been involved in several discussions when automation of the process has been discussed and planned. They have approved the automation of the process and have commented

it to be beneficial for their work because of better data quality. Regarding the new lead definition, they see no need for change. They consider budget and funding to be the same thing.

While evaluating the process it was noted that if lead definition doesn't change, there is a gap between marketing and sales processes. Also, the resource reservation can't relate to an existing opportunity. Opportunities in CRM system have specific, exact euro amounts, budget values in lead currently follow a scale:

- 0-99 k
- 100 k – 199 k
- 200 k – 500 k
- 501 k – 1 M
- Over 1 M

This would mean that when automating the process, the reservation always needs to be created under the account, not under an opportunity. This also means that no metrics will be available for evaluating if tradeshow resources are needed for existing opportunities or for new lead creation.

However, in recent discussion it has also been noted that removing the possibility to make resource reservations under an opportunity is convenient also for sales. They have existing long list for different activity types that need to be conducted under opportunity. Training sales people is easier when it is told them to conduct marketing activities only for accounts, not for opportunities.

As a result, the lead definition will not be changed. As part of the renewed process, part of the data will come from CRM system, but during the tradeshow, the people who are capturing leads, need to full fill the BANT information on the reservation forms. In practice, this means that budget and timeline questions need to be asked, authority as well, if it hasn't been checked beforehand.

This study has however initiated new discussions that still continue once noticing that things could be done better and faster in the future.

### 5.3 The lead quality improvement

The system integration has already been started, because of bad experience and a data failure in a recent tradeshow. The expectation is that the lead quality will improve as well. In the new setup, the account and contact data will come automatically from CRM system. In proposal, the idea was to replace BANT qualification with FAINT method. This would have meant that qualification could have been partially automated as well. As FAINT method was rejected, the basic lead quality will improve, but lead qualification questions will be asked from a customer anyway.

Going through the proposal, different teams commented that automation is a good start for improving the lead quality. Because system integration will be completed and resource reservations will be done from CRM, using account and contact details will give accurate data. No need to ask for customer e-mail address or other contact details. However, the lead qualification questions still need to be asked.

Once planning the solution and having discussions with marketing and sales, it also started a fruitful discussion between marketing and sales common objectives. Sales is interested in to have meeting data under the contacts and accounts. The meeting data is needed to understand the amount of efforts that is needed to close a deal and win the opportunity. This would mean that event tool could possibly be used for all event and meeting types in the future.

Also, the data would be needed both under accounts and contacts, because Salesforce is enabled with artificial intelligence, Einstein. Einstein can analyse big amounts of data and make recommendations in the future, for automating the account plan. If a certain opportunity is open, Einstein can make a recommendation, based on existing data: "A meeting with contact X, title XyZ, is recommended. A demo ABC in the tradeshow next week is needed." For this reason, all meeting and event data is needed but sales weren't yet aware that marketing can provide such data with this system integration.

### 5.4 The automation of the lead creation process

The first step in the automation is already happening. The system integration decision has been done and the data mapping plan is already being built. This means that sales

can start doing the resource reservations under the account and adding the contacts they already have in the CRM system. With this, the target of removing manual work from event team in creating lead file will also be achieved.

The biggest development has happened in the mentality of sales and marketing. Marketing previously thought that Salesforce is sales platform and it shouldn't be touched. Sales thought that marketing is conducting marketing campaigns in Marketo platform, they are isolated and sales doesn't either see the results or doesn't understand what are those leads that come as a result. Now that Marketo Salesforce integration has taken place and first marketing application integration is taking place, the vivid discussion between these two entities has started. The common objectives and targets in organizing events and providing customers what they need is happening.

#### 5.4.1 New segments and growing the business

A proposal to build marketing automation programs for different levels of customers will be done by implementing customer profile segmentation into use. This means that Marketo, marketing automation program, will have different triggers in use. If it has been recorded that customer has seen a certain demo and he has also downloaded a whitepaper, he will be added into a specific spot in marketing automation program and not the beginning.

These marketing automation programs are built as described here:

<b>Customer journey step</b>	<b>Asset delivered by e-mail</b>
Customer fills in a form on website	Whitepaper
Customer clicks whitepaper open	A link to a video
Customer views video	Customer testimonial
Customer reads customer testimonial	Invitation to a webinar
Customer participates webinar	Call from sales
<b>Sales lead or break in nurturing</b>	<b>Time spent 5 weeks</b>

Table 1.

If Marketo recognizes that in customer activity history, there is already a whitepaper, he will be added to the next step in customer journey. With one week intervals, he will receive different assets and links and if he is continuously interested in, sales will contact him for making an offer.

Different marketing automation programs will be built. Once customers visit Nokia in a tradeshow, they will be tagged with different topics. These topics will then define, in which program they will be added. If customer is already in a marketing program, he can't be added to another one for a month.

New customer segments that are not familiar with Nokia, will benefit from this, because over time they will receive more information about the solution they are looking for. They will also have an opportunity to familiarize with Nokia over the weeks, so no need for sales to start explaining the basics and nurture the customers themselves.

## 5.5 System integration

This study has initiated a well-received discussion about the company network architecture, marketing applications and what is the role and process behind each of them. Still few months ago, once this proposal was being built, marketing provided a list of tools they wanted to integrate with Salesforce. It was still very unclear what was the role of those tools, why three different tools would be needed for events, who would be the owner and how the process would be like.

The lengthy discussion of integrating event tool into Marketo Salesforce system has shed some light on the approach. Platform – layer thinking is a good approach that gives a frame to this planning but also gives some freedom on layers. Layers can be designed very creatively because there is no heavier integration between layers. The foundation is platform-layer integration, not integration between layers.

Marketo Salesforce has now been identified as a platform and on top, several layers can be added. Marketing organization is no longer intimidated by Salesforce but gradually starts recognizing the need to align tools and processes with sales. Sales has noticed the business benefits marketing can provide with different tools.

Now that first project has taken place and there have been some learnings on both sides, it is easier to move forward and think how to improve even more.

## **6 Conclusions**

The objective of this study was to automate a lead to opportunity creation in Marketo Salesforce architecture by integrating event tools to this frame. The target was also to improve the lead quality and minimize the need of manual work. One objective was to understand how should system integration happen and what needs to be done to make it successful.

This study started already in January 2017 and after 9 months it is easy to understand how fast things have changed. After quite dramatic mistakes done in one of the tradeshows during winter, it wasn't hard to convince the teams to integrate event tools into CRM system to automate the process and improve the data quality. This integration is currently ongoing and will reduce manual work needed from teams.

Complete jump to automated process will still be lacking. Even though the target was to automate end-to-end process, the lead qualification team want to maintain the manual qualification process of leads. The leads that are generated from various tradeshows, won't be automatically transferred to Marketo, but instead uploaded with an Excel, once they have been qualified by a lead team.

From quality point of view, this is good approach, but if volume grows, it is hard to keep the pace and provide sales leads to sales as fast as they should be delivered. It will be interesting to follow if this process step can be maintained or if it can be trusted that with qualification rules in Marketo, this will also be automated.

Also, changing legislation and tightening privacy rules create new borders for marketing automation. It is no longer self-evident that customers can be added to marketing programs without their consent – or at least a proof that such consent has taken place, at least orally.

The biggest achievement in this study was to form a team of sales and marketing people discussing together the tool landscape, related processes and objectives. Once this

study initiated, the people who were interviewed, didn't have a clear picture what is happening in different teams and what is the goal. Now that discussion is happening and there is a vivid discussion about business benefits and how to achieve them.

Writing this thesis, it was hard to draw the lines what to include and what to leave out. The situation changed continuously, new requests came in, new development and new processes took place and interesting topics raised from this project.

One thing was clarified. Marketing, as an organization, has been working for years so that once there is a challenge, a new tool is purchased. Capable sales people and new start-ups have built their business on marketing needs and solved some of the process and data challenges that marketing has.

This can't continue anymore. Consistent data flow is needed to prove the value of marketing activities, to respond to changing privacy regulations and to provide the value to the customer that he is looking for. Therefore, it is essential that marketing starts thinking about tools, applications and systems from marketing architecture point of view: how do different applications and platforms fit in together, what is the data structure and flow and how is this data used for customer benefit?

This work was only a start for this work and thinking. Besides event tools, marketing has different applications for social media, digital advertising, print advertising, marketing research and lots of other things. All these together should form a logical entity, not single, isolated data pieces that different teams use for their own activities.

## **7 Discussion and recommendations for future**

The need for well-structured data and a method for accurately collecting data is extremely important in the context when there is a will to serve customer per their needs. It is important to think in advance what is the data structure that is needed to serve the customers best and how can that information be collected and fulfilled.

To analyse the data effectively, the data needs to be aligned and searchable. If company needs to understand whether customer is interested in red wine, white wine or

prosecco, the list of wine preferences should include eg only values like: red wine, white wine, prosecco. It can't be a field where a marketing or sales person can write values following their more detailed interests: Merlot, Chardonnay, Bordeaux, Chianti. That data might be unnecessary but of course nice to have if company would have a business model that supports that need. For this, the data structure should be planned well in advance and there should be limitations for free texts in data fields as much as possible.

Another important factor is data accuracy. Sometimes the best option for keeping the data accurate is to ask people to update their personal details themselves. This is also a risk – they might be tempted to lie to avoid eg phone calls or too frequent marketing e-mails.

However, next year, the data privacy regulations will change and already now, EU law on privacy states that:

- Under EU rules, you have the following rights vis à vis data controllers:
- Data controllers are required to inform you when they collect personal data about you;
- You have the right to know the name of the controller, what the processing is going to be used for, to whom your data may be transferred;
- You have the right to receive this information whether the data was obtained directly or indirectly, unless this information proves impossible or too difficult to obtain, or is legally protected;
- You are entitled to ask the data controller if he or she is processing personal data about you;
- You have the right to receive a copy of this data in intelligible form;
- You have the right to ask for the deletion, blocking or erasing of the data.

(Protecting your data: your rights, (n.d.))

Therefore, to respond to the tightening data and privacy regulations, there should be already a subscription centre created and opened for customer use. Customers have a right to check their contact details and what they have been subscribed to. Also, if customers are added to marketing programs, they need to give this permission themselves and the company needs to be able to prove that – when, where and how this permission has been granted.

This will create new kind of challenges also in B2B marketing. Traditionally, it has been considered that B2B customers have given this consent by doing business with a company. This detail should be checked and validated together with a company lawyer.

This will also mean that even though there are accounts and contacts in CRM system, the decision to add these people to marketing automation programs should be asked and validated from the customer at the tradeshow stand. How this validation happens and what kind of data needs to be included, should be carefully considered.

This change might mean that in the future, the decision to add people to marketing programs might be available in subscription centers eg including following data details:

- Personal details
- Marketing programs where customer belongs to
- Date and place where the decision to add this contact has been done

The tightening data regulations pose new challenges and for this reason as well, a good understanding of data and tool architecture is needed in marketing. To avoid accusations of false data and wrong subscriptions, the proper planning of data flows and structure needs to be started, if not already in place.

## References

Ewerman, D. (2015) *Kundupplevelse*. Stockholm, Sweden: BookHouse

Kauhanen-Simanainen, A. (2003) *Informaatioarkkitehtuuri*. Helsinki: CIM Kustannus

Mager, B. (2009) *Introduction to Service Design. Digital communications tool*. [Online] Culminatum Innovation

Available from: <http://www.share2solve.org/introtosd/start/Main.html> [Accessed 03/09/17]

Miettinen, S., Koivisto, M. (2009) *Designing Services with Innovative Methods*. Helsinki: Otava Book Printing Ltd.

Saget, A. (2006) *The Event Marketing Handbook – Beyond Logistics and Planning*. United States of America: Dearborn Trade Publishing

Schultz, M., Doerr, J.E. and Frederiksen, L.W. (2009 and 2013) *Professional Services Marketing*. Hoboken, New Jersey: John Wiley & Sons, Inc.

Schwartz, G. (n.d.) *4 Questions to Develop Long-Range Sales Leads* [Online] Hubspot  
Available from: <https://blog.hubspot.com/sales/questions-to-develop-long-range-sales-leads#sm.001tvojij1a5zd3kv0j14sbn0bky> [Accessed 01/02/17]

Stickdorn, M. and Schneider, J. (2010) *This is Service Design Thinking*. Amsterdam, The Netherlands: BIS Publishers

## Survey questions

1. How long experience you have about the lead process from sales/marketing perspective?
2. Which systems and tools you have experience about in lead management/marketing automation?
3. How familiar are you with the lead process for tradeshow leads?
  - a. Probe/Opinion if somehow familiar: What is the biggest benefit of following this method? What is the biggest weakness in this method?
4. Who, in your opinion, owns the process and is the main driver in this?
  - i. Probe/Opinion: Why him/her/this function?
5. Tell/describe me what happens from your perspective/in your role once leads are uploaded to CRM following this method/process.
6. How do you see this approach?
  - i. Probe/Opinion: Weaknesses/Benefits
7. Is there something missing in this approach from your perspective or is everything good?
8. If you are yourself working with lead management, how many people besides yourself are supporting this in your function? How many vendors?
9. Are you familiar with a set of event tools for lead collection? (JiffleNow, eTouches, TapCrowd, ON24)
  - i. In your opinion how do they differ one from another?
10. These tools could be integrated with Marketo and replace Excel list uploads. What do you think about that possibility?
11. If these tools would enable automated lead flow from tradeshows to Marketo/SalesForce, how would it affect your work?
12. What is the biggest benefit/weakness to your work if this would happen?
13. What would be your biggest concern?
14. How does sales identify and profile the target prospect in their normal way of doing business?
15. What pieces of qualifying information do they capture and what must they capture?