Marketing automation implementation guide for company X

Edvin Kissel
According to Digital Marketing Institute in 2020 customers’ expectations and interactions will continue to change and there is more hard work needed to meet consumers expectations. Brand reputation and uniqueness is in very important role and customers are looking for more personalized marketing experience based on their needs, behaviours and interests. To make the personalization possible through various digital marketing channels marketing automation system as tool is needed.

The implementation process of marketing automation system is not simple and requires an understanding of basic implementation steps and technical details, which might be not easy for marketers. The implementation partner is there to help, but sometimes communication and responsibility partnership can be challenging and there is help needed.

The aim of this thesis is to create a guide for company X customers and internal employees where are all implementation process steps explained and as well as steps to be able to implement MAS and go-live with agreed schedule.

As the result of thesis research five interviews were held with company X customers and internal employees. The implementation guide has been created and provided for company X internal and customer needs. At the end of the research company X decided to change the way of working to be more structural and documented.

The guide is attached as appendix only for HH internal version.
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1 Introduction

According to Digital Marketing Institute in 2020 customers’ expectations and interactions will continue to change and there is more hard work needed to meet consumers expectations. In 2020, the role of personalized experiences will increase, and consumers will desire brands which are unique and personal. There is a hard competition for consumers between companies and only the best marketing strategy wins. To get the customer satisfied, improve sales and reduce end-to-end service cost marketers need a toolbox which helps them to reach customers via digital channels. (Digital Marketing Institute. 20/20 Vision. 2019.)

This needed toolbox is a MAS (marketing automation system) and according to research about 44% of marketers believe that it is one of desirables skills in 2020. Marketing is about reaching the customer and with nowadays competition efficiency needs to be increased. There are many manual marketing activities which can be fully automated with MAS. As a result, marketers can focus on more demanding tasks such as strategy and client interaction. (Digital Marketing Institute. The ultimate guide to marketing automation. 2019.)

The topic for this thesis is related to researcher personal interest and the researcher’s employer need. During the fall the researcher had a discussion with a supervisor in case of which thesis topic will benefit the company. As the researcher and company’s supervisor is working with marketing automation projects and is facing issues with a clear definition of how the implementation process should be done properly. It has been decided that as a result of the thesis researcher will create a Marketing Automation discovery guide that will help existing customers and internal employees to have a better understanding of what needs to be done before the Marketing Automation implementation project can be started.

1.1 Company introduction

Company X is a leading Salesforce consulting and training partner in the Nordics with more than 250 experts in the following countries: Finland, Sweden, Denmark, Norway, Slovakia, and Germany. The company X helps customers to achieve their goals with using of Salesforce technology. From the beginning the company X was an international company by hiring employees from outside of Finland and giving the free space of work as Salesforce products are not requiring physical data servers and work can be done from everywhere.

The company X has delivered 806 projects and employees are holding 371 Salesforce certifications. The company X is offering the following services:
• strategy and advisory services to provide the best practices and advice on how the strategy should be improved;
• implementation and integration to help with technical project implementations and share the data between systems with the help of integrations;
• on-going services and enhancements to help customers find the right experts when the help is needed;
• business and technology accelerators to help customers understand how their business can be improved with the help of Salesforce technology.

1.2 Purpose of the study

This main objective of this thesis is to help company X with guiding their customers during the marketing automation system (MAS) implementation process. For that purpose, the MAS implementation guide will be created. The guide will provide a clear vision of the implementation project and explain customer’s role in the technical implementation process.

The idea is to create a guide for new business-to-consumer (B2C) and business-to-business (B2B) customers who are:
• replacing their existing marketing automation solution with Salesforce Marketing Cloud or Salesforce Pardot;
• implementing Salesforce Marketing Cloud or Salesforce Pardot for the first time.

The guide should fulfil the following needs:
• marketing automation implementation project roadmap with project steps;
• what is required from the customer;
• who is responsible for each implementation step;
• what processes need to be implemented.

In addition, the guide will give an understanding of marketing automation terms, project implementation phases and marketing automation processes that need to be implemented. The aim of the sub-objective is to improve the communication between customers and implementation partner by reducing the complexity of implementation phases.

Research questions are listed below:
1. What is a marketing automation system?
2. Which implementation phases are important?
3. What information customer should provide to an implementation partner?
The scope of this thesis is to improve the implementation process of the company X and avoid risks in implementation processes. This thesis is limited to Salesforce ecosystem products as company X is only focusing on Salesforce product implementations.

By creating this document all parties of the marketing automation system implementation project get involved and informed. By reading this document customer gets more understanding of what benefits and functionality the MAS implementation will bring to the company. With the help of this guide implementation partner will have a final understanding of technical requirements, implementation configuration and processes

1.3 Thesis structure

This thesis is divided into six main sections. The first section introduces the subject of the thesis, the case research company, the purpose of the study including research objectives and questions and limitations of the thesis subject. The second section defines the meaning, the use of MAS and MAS related terms. The third section describes the methodology used in the thesis research, the background of the research and how the data has been collected and analysed. The fourth section describes all steps of how the guide has been written including interview analysis. The fifth section is a discussion about results, what was the success, which problems were faced and what were the limitations. The last, sixth section is about the summary of results and how the guide can be developed further.

1.4 Limitations

Even the market is full of various MAS solutions, but the amount of available literature is still low. As a result, if technology-related literature is more than 10 years old, then it is outdated and most available up to date literature can be found only in online article format. Because of this limitation, mainly online available articles have been used.

This case study is concentrated only on Salesforce technology as the case-initiated company X works as Salesforce implementation partner. The implementation guide is limited to non-technical content to make the guide available to the wide audience without required technical understanding of MAS details. The study is not limited to specific MAS setup and the implementation guide brings only few use cases of MAS implementation. Due to the time limitations, the researcher focused only on MAS implementation and technical part for implementation consultants is out of scope. It is already agreed
with company X supervisor that the researcher will focus on a few more guides which will change the way how implementation will be handled in with new customers.

### 1.5 Definitions

All the definitions that are mentioned in this thesis are explained below.

<table>
<thead>
<tr>
<th>Term</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>B2C</td>
<td>Business to customer</td>
</tr>
<tr>
<td>CRM</td>
<td>Customer relationship management</td>
</tr>
<tr>
<td>Ecosystem</td>
<td>Multiple software applications from the same software provider. In common case software core base is shared between systems.</td>
</tr>
<tr>
<td>GDPR</td>
<td>General Data Protection Regulation is a European Union law regulation that protects data and privacy for all individual citizens of the European Union and the European Economic Area.</td>
</tr>
<tr>
<td>MA</td>
<td>Marketing Automation. The way of automating marketing activities.</td>
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<tr>
<td>MAS</td>
<td>Marketing Automation System. Software-as-a-service which gives the possibility automate marketing repetitive tasks</td>
</tr>
<tr>
<td>Marketing Permission</td>
<td>Permission to receive messages. Permission is collected through registration or newsletter sign-up.</td>
</tr>
<tr>
<td>Personalization</td>
<td>Marketing strategy to reach customers with individualized messages</td>
</tr>
<tr>
<td>ROI</td>
<td>Return of investment</td>
</tr>
<tr>
<td>SaaS</td>
<td>Software as a service. The model of licencing software based on subscription basis.</td>
</tr>
<tr>
<td>Segmentation</td>
<td>Dividing subscribers into groups or segments based on unique criteria</td>
</tr>
<tr>
<td>Subscriber</td>
<td>Customer who has subscribed to receive MAS messages</td>
</tr>
</tbody>
</table>
2 Definition of marketing automation system (MAS)

Marketing automation system is a software which gives the possibility to automate repeatable marketing activities and multifunctional campaigns by using multiple channels. With the use of MAS marketers can reach target groups with automated messages through emails, web, social, offline, push and SMS messages. Marketing activities can be defined as cases and fully automated as customer marketing steps. Automating manual repeatable tasks gives marketers a possibility to increase revenue, maximize efficiency and see how customers are reacting to targeted messages. From the reporting perspective the benefit is also clear, it is possible to follow customer’s reaction on the content, see sending information and measure ROI. (HubSpot 2019.)

MAS works differently depending on the marketing case needs. Still there is a common way of working for a regular case.

Image 1. Automation process (Digital Marketing Institute. The ultimate guide to marketing automation).

Everything starts with looking for subscriber data, without knowing personal data marketers can’t reach subscribers. The data can be already available in the company's CRM and with the same ecosystem synchronization the data can be passed to MAS or imported through custom integration process. If subscriber's data is not available (data is too old, bad or not existing), the data collection process starts with the scratch via multiple ways:

- email sign-up form;
- webstore registrations;
- social media events;
- sign-up form on website;
- fair;
- registration for getting additional materials;
- feedback forms;
- purchase contact list;
- events.

As the data collection is complete, it is time to create a target group by using segmentation, as an example location and age. Every target group needs to be unique to reach correct customer segment with the correct message. The segmentation criteria can be used in message personalization to individualize the content on each subscriber interests and build one-to-one relationship with the subscriber. (Digital Marketing Institute. The ultimate guide to marketing automation. 2019.)

The next step is to define when, how customers will be reached and what messages will be sent. As example subscriber signed-up for company X newsletter through the form on the website and with MAS it is possible to send a welcome message after subscriber submits the form. With the workflow we can set up which messaging channel (one, many of all of the channels) will be used and what is the content of messages subscriber gets, when messages will be sent out and what actions will be taken after the send (as example subscriber’s status can be updated). (Digital Marketing Institute. The ultimate guide to marketing automation. 2019.)

The last step is the activating of send process and checking performance as example opens and clicks from tracking. This is the basic concept of MAS and this how the basic manual marketing activity can be fully automated. (Digital Marketing Institute. The ultimate guide to marketing automation. 2019.)

MAS history started in 1987 when the company ACT! revealed the first CRM platform as a database marketing software. The system was limited to only a few enterprises uses and the price was too high. In 1992 the company Unica created web analytics software for marketers but unfortunately, it wasn’t popular either. In 1999 the owner of Salesforce.com launched CRM software based on a subscription model and CRM platforms became more affordable for the market. By doing this Salesforce reinvented the industry and the model got a name - SaaS. The year 2001 was a dramatic change in MAS history, new MAS like Eloqua and Neolane captured the market and later. In 2008 Barack Obama managed to win the US presidential elections with help MAS by sending emails to potential voters. (VWO 2019.)

In 2019 MAS market capitalization is $5.5 billion industry. Marketing Automation is a software that helps marketers to deliver personalized messages to existing and potential customers through various marketing channels. By using marketing automation personalization features, the same message can
look different for each customer according to their interests and needs. This helps to build a strong relationship and increase sales. (VWO 2019.)

The biggest industry changed happened for 2010-2014 years when ExactTarget acquired Pardot for $95 million and Salesforce acquired ExactTarget for $2.5 billion. This changed the amount of MAS corporations and the role of competitors. From that time MAS big players are Oracle, IBM, and Salesforce. (Mathur, S 2019.)

With the help of marketing automation marketers and sales can stop chasing customers one by one, they can analyse the target groups and schedule all marketing campaigns for many months ahead. As scheduled campaign sending process triggers on a specific day, messages will reach target group subscribers through emails, SMS, push notification and social media. With marketing automation all sending events are trackable and statistics are visible in real-time. This means that marketing and sales can see customer behaviours and analyse which content and products are relevant for their target audience, which can be improved or even removed to meet better expectations and goals. (Quick sprout 2019.)

Marketing automation can be integrated into any CRM system and the data of subscribers and products/services can be used to get all needed information and to offer the best content to subscribers. Marketers and sales no longer need to understand complex coding, marketing automation systems offer easy to use interface and all the data can be exported in a matter of clicks.

With available MAS toolkit, B2C companies can track new sales leads overall online channels including social media, email marketing, and content marketing and reach them with content they are interested in. MAS can help to develop digital strategy by testing email send times, subject heading, content quality and ideas of personalization. MAS is not about sending marketing spam to subscribers, it is about sending highly personalized messages based on subscriber interest and improving the marketing and sales processes based on subscriber behaviours. (Linnemanstons, G 2019.)

2.1 How marketing automation system is used

Marketing automation system can be used in many ways. Everything depends on the company requirements, use case and customer type. The idea of MAS is to support companies during the whole customer lifecycle process. MAS is used in various marketing purposes covering email marketing, social media marketing, and ad campaigns. The basic MAS setup gives a possibility to automate the sending of campaign emails. The more advanced MAS setup gives the possibility to
involve various messaging channels like SMS, push notifications and social media. (Drip 2019.)

2.2 Business-to-consumer marketing

The company X’s customer type makes the biggest difference in the use of MAS. In the case of B2C Salesforce offers Marketing Cloud, where the focus is on customer engagement and content deep personalization based on interest and behaviours. Marketing Cloud is a cloud-based software which is based on monthly licence. To get the best benefit of the tool B2C customer lifecycle marketing model is recommended to use. All customer lifecycle activities should be mapped as cases and automated as much as possible. With Marketing Cloud channels marketers can reach customer during all customer lifecycle stage.

2.3 Business-to-business marketing

If a company is dealing with business-to-business type of customers, the Salesforce Pardot is the right tool to choose from. Pardot is a tool for B2B companies who are interested in getting business with companies and there is a lead process involved. In case of B2B there are two different sales strategies which can be used.

Image 2. B2C customer lifecycle marketing model.
The first strategy is called the sales funnel and the model includes four stages. It all starts with the first one, which is related to awareness. It takes place when a customer discovers a brand and is curious about it. Get the customer online, social media, paid advertising channels are used.

As customer is aware about the brand, the research stage takes place. During this stage customer learn about the brand and the web content as web pages and videos make this stage possible. During the third stage customer gets offers, free trials and promotions to make the buying interest. The last step is the action from the customer to buy and to become a company's customer. This stage is important, and actions are needed as well to get customer stay as a regular customer and newsletters, digital feedback cards, reward programs are used. (Digital Marketing Institute, Lifecycle marketing vs. sales funnel 2019.)
Another marketing strategy which is quite commonly used in MAS is called as lifecycle marketing and it is more focused on the customer rather than sales process. The customer gets inspired by the brand trust and ethics. The model has also four stages and starts with awareness of discovering a brand. During the second stage customer research about the brand and thinks about decision-making. The fourth step is the decision to buy and provide the feedback. The last step is a becoming a loyalty customer with reaching the customer with follow-up emails, loyalty program and exclusive access. (Digital Marketing Institute, Lifecycle marketing vs. sales funnel 2019.)

2.4 Lead Capturing

On the business-to-business side, potential customers are leads. Everything starts with capturing leads, the first step of marketing in B2B segment. B2B customers are quite different than business-to-consumer: the relationship needs to be strong and number of customers is more less than in B2C segment. (Drip 2019.)

Lead generation happens in more places and reaching the lead is more accurate and time-consuming process. With help of following ways leads can be captured:

- download forms – customer enters contact information to get the downloadable piece of the content;
- blog subscriptions – sign-up form to get the newsletter with fresh updates;
- webinar attendees – sign-up form to submit for webinar based on interest;
● landing pages – call-to-action pages with informative content and sign-up forms;
● pop up forms – forms which pop ups during the browsing on company website. (Drip 2019.)

2.5 Lead Nurturing

The idea of marketing process is to bring potential customers to sales. To do that there is a need of a good relationship between buyer and sales parts. This relationship building process is called Lead Nurturing. The process focuses on good relationship in sales funnel by providing communication, listening to the needs of prospects and providing answers to questions. (Marketo 2019.)

![Lead nurturing and sales funnel](image.png)

Image 5. Lead nurturing and sales funnel (Marketo 2019).

2.6 Lead Scoring

During lead nurturing is important to know how leads are progressing and from which channels leads are coming. For this purpose, there is a lead scoring strategy. The strategy helps to point out which leads are following which buying model. This is a very relevant information as it is identifying what communication channel should be used for lead. There are four types of scoring:

○ fit – describes how buyer fits the brand’s ideal prospect. There are three categories to identify the fit
  ○ demographics – buyer’s information like job title, location and years of experience;
  ○ firmographics – location of the company, name and size;
- budget – does lead have enough money to buy a product or service;
- interest – how much lead is interested in the brand;
- behaviour – does lead just interested in the content or ready to buy;
- buying stage and timing – is a lead a potential customer or direct buyer. (Marketo 2019.)
3 Methodology

This section focuses on research methodology, background and data collection method which are used in this particular case study research.

3.1 Research method

This study uses a case study methodology as the study research context is related to real-life and limits between content and contemporary phenomenon are not clear enough. This methodology allows researchers to collect evidence about phenomena at company X through one-on-one interviews with company X customers and employees. The case investigation can be done based on knowledge, experience or data analysis. In this case, qualitative research data were collected during literature research and one-on-one interviews. (Farguhar 2012, 5–6.)

A one-on-one interview is one of the most common qualitative research methods and is held with on respondent at a time. The idea of an interview is to get details about the case study subject by having a deep conversation with questions prepared in advance. The main benefit of having one-on-one interviews over group interviews is that subject responses remain free and spontaneous. During the interviews, follow up open questions are used to allow the flexible structure of the conversations and get personal opinions about the subject. (Farguhar 2012, 5–6.)

There are three types of one-on-one interviews available:
1. Structured interview. Interviews are guided in very detailed level and all topic and subtopic questions are covered during the interview
2. Semi-structured interview. Interviews are guided but not in so detailed level
3. Undirected interview. Interview is not guided at all and only main topic is mentioned in the beginning of the interview. (Critizr 2019.)

Structured interview types the best support this case study research as the interview is guided on the details level and it is important the get feedback about MAS implementation from company X customers and internal employees. (Critizr 2019.)

3.2 Data collection method

The data for case research was collected from multiple data sources. To get new insights into the research questions primary data was used as a collection method. The primary data was collected during face to face interviews with company X customers and internal employees. As the research
instrument, a questionnaire with predefined questions was used. The questionnaire included open questions. (Farguhar, 68 2012.)

As part of qualitative data collection, a semi-structured interview was used. This means that the interview is guided but questions are open and flexible. The interview is following research objectives and questions are in a logical order. All together five interviews were held during the research.

3.3 Data analysing method

The analysis of the case study data is not common as the collected data is a qualitative. From another perspective it is common that the data analysis is happening during the data collection. In case studies OTTR (Observe, Think, Test and Revise) data analysis method can be used. (Preciousheart 2019.)

The analysis starts with observing collected data and thinking what collected data means. This thinking leads to ideas about the new types of information to confirm existing interpretations. The next step is to test how original collected information matches new types for information and during the revise-step information gets compared to give the final verdict. In this case the information collected during the interviews will be compared to information found during the literature research and based on analysis will be added to implementation guide. (Baškarada 2014.)
4 Creating a guide

The idea of creating the guide for case study relates to personal interest to marketing automation topic and as the result of held discussion with the researcher’s supervisor of company X. The guide is created for customers and internal employees’ needs of company X. The main idea of the guide is to provide a basic understanding of the MAS implementation process and what prerequisites are needed to be able to implement MAS with the basic technical setup.

The timeline for the guide is agreed upon during the online meeting with the thesis and company X supervisors on 6.9.2019. The guide work started on 7.9.2019 and the first version of the guide is submitted for the feedback review to all interview participants on 28.10.2019. On 4.11 feedback changes were analysed and implemented to the final version of the guide.

The action plan for writing the guide is described in the image below and during the next chapters, the creation of the implementation guide process is described in more detail.

4.1 Define research objectives

The work started with defining what are the research objectives and how they will be solved during the research. The meeting with Haaga-Helia’s thesis supervisor and company X supervisor was held on 7.9.2019. during the meeting, the thesis plan was deeply analysed, and thesis objectives were defined. Haaga-Helia researcher mentioned improvements to the original thesis plan which was defined during the Master thesis workshop as Haaga-Helia master program course.
4.2 Define research methodology

The next step was to define what research methodology can be used for the research case. During this step was decided that MAS literature available online will be used as the amount of available printed literature is limited. To get the best MAS implementation experience, the interview data collection method was decided to use.

4.3 Analysing the current state

The next step is to define the current state of the MAS implementation process in company X. This was done by having an interview with company X internal employees. The aim of the interview was to get the knowledge and a big picture what are the current implementation process steps and what needs to be improved. As guide structure was not clear at that moment, interviewers also helped to understand what kind of topics the implementation guide should include and how technically complicated the guide should be.

4.4 Literature analysis

During the next step, interview questions were defined by literature research and interviews with company X customers and internal employees were held.

4.5 One-to-one interviews

For interview participants following parties were chosen:

- MAS specialist, customer of company X, telecommunication industry (customer A)
- MAS analytic, customer of company X, telecommunication industry (customer B)
- B2C Implementation architect, internal company X employee
- B2C Implementation technical consultant, internal company X employee
- B2B business consultant, internal company X employee

To get as much information about the MAS implementation process as possible from the customer perspective, two customers were asked to participate in the interviews to provide the vision of the implementation process. Both customer side interview participants work in the telecommunication industry. Customers easily accepted invitation to interview as were interested to share their experience and to have a copy of implementation guide for their internal needs. To get another view of the MAS implementation process from Company X three interview participants with a long experience were asked to join interviews.
Interview questions were modified after the first interview round to correspond interview better. The interview was held with each interview participant face to face and all interviews were voice recorded with the help of a mobile phone. This helped to concentrate on interview participants and their experiences during the interview and also to analyse better the content afterwards. All interviews were written as the digital text document and compared with each other to avoid repeating the same information and to analyse which topic is important for the implementation guide.

Scheduling interview events happened by asking suitable time slots through email messaging and agreeing on the interview times. Interviews were planned to happen in one month with a difference in about one week to avoid overlapping in case of changing the time and to be able to write down the interview results after each interview.

4.6 Analysing interview results

As interview were held, saved audio recordings were written out into Google Sheet documents to have all needed information available for result analysis and implementation guide writing part.

All of interview participants agreed that MAS implementation process needs to be improved and organized to make implementation more efficient and easier for customer and implementation partner sides. The biggest issue is related to agree what needs to be achieved with MAS. It is a very common case in companies just to implement MAS and not get the full benefit for using at properly. Here are topics from interview participants opinion, which should be included into implementation guide:

- team members;
- data;
- content;
- subscription management;
- use cases.

All interview parties agreed that there is a need of separate implementation project manager from implementation partner side and marketing automation lead from company side. Also, MAS technical consultants are wanted to be involved from the early stage to understand the core company business and what needs to be done to go-live with simple MAS solution. As MAS is live more functionality can be added based on case as example add push notifications and social media as additional channels to reach customers.

The importance of the data in implementation phase has been highlighted by all interview participants. The data comes from many directions and that’s why the help of database professional is needed from
both, CRM and MAS architects. Old, duplicate and unused data should be cleaned off and subscriber data should be GDPR compliant.

All interview participants agree that it is very important to start working on the message content. This needs to be prepared in advance as it is the most crucial and time-consuming parts, especially if the company uses multiple languages in their content.

During the interview participants shared their experience about getting subscriber related data GDPR compliance for MAS use. According to the experience all GDPR questions have already been solved before the GDPR statement about the data privacy became legal. All of interview participants mentioned that subscription management is a very important and go-live is not possible without offering subscribers the way of unsubscribing from email communication. As subscriber unsubscribes, the information should also be updated to CRM system.

To get go-live case descriptions needs to be provided, according to all interview participants getting use cases is not an easy process and this needs to be improved to understand how use cases can mapped and implemented.

4.7 Creating a guide

As all five interviews were held and interview results were documented, the structure of implementation guide started to be clearer. Additionally, the list of interview questions provided a good structure how implementation guide topics should be structured, and interview additional comments helped to finalize the structure of the final version of implementation guide.

The process of writing the guide started as all interviews were held, written down for analysis and mapped to correct topic of implementation guide structure. The idea was to use interview content as much as possible as internal employees of company X have a lot of hands on experience to guide the customer and explain what input is needed to get MAS implementation go-live successfully.

Researcher’s own experience helped to understand all the small details about MAS implementation. The basic MAS definitions are market in theory section.

The guide was created as a Google Sheet document on company X Google Drive. This gives the possibility to share the guide with supervisor and all of interview participants in a matter of clicks and kept the version up to date in a safe online storage. Guides’s graphical elements were created with the use of graphical element library from the company X.
4.8 Feedback and changes

As written part was ready the researcher has sent the link to Google Sheet shared document to all interview participants and the company X supervisor via email. In an email message it was asked to get feedback on the implementation guide. The feedback was received from three parties and has been added to implementation guide.

4.9 Final version

The final version of the implementation guide has been shared with the company X supervisor and it has been agreed that the marketing department will do additional spell check with native English speaker before the will be sent to existing customers, shared internally and will be taken in use as a part of implementation process.
5 Conclusion and further development suggestions

The goal of the case research has been met and the implementation guide is now available for the company X’s internal and customer needs. The guide helps customer to understand what materials and actions are needed to provide. There were a lot of learnings from customer sides as well: how the work should be organized and how stressful it can be do understand all specific marketing automation system’s aspects in a short time. With this guide internal employees of the company X can also understand how to handle implementation project as routine and in which stages help their customers to understand what is needed to go-live in an agreed schedule.

The result has exceeded expectations of the company X’s supervisor and customers. According to the feedback from the company X’s supervisor, the implementation guide will change the way of working not only in MAS team, but also in all the other departments. It has been already agreed that several similar guides will be created for other inside processes as well.

6 Discussion

This case research helped to understand how much background work MAS implementation process requires. There is a space for improvement the process from company X employees. MAS implementation guide will help customer to understand how MA implementation can be done in the right way and how much effort does it need from customer part as well. With this thesis the researcher was able to summarize the own MAS experience together with interview results and produce the document which will be available for all internal employees, existing and new customers. The guide will reduce the number of mistakes, implementation planning time, uncertainty of implementation process in MAS implementation project.

The work has been finished in the agreed time and the guide after spell check by marketing team will be shared with all internal employees as well as delivered to new customers who has implementation process on the schedule.

Scheduling the interview was surprisingly easy as all interview participants approved sent invitations right away and I was able to get permission to record findings to analyse them later.

The biggest challenge was to understand how the start the guide creation process and how the guide should look like as the final result. Another challenge was to limit the work to marketing language and not get deep with the details of implementation process. As a result, one part of implementation was seen as too technical and was taken away from the guide because requires a deep understanding of
technical aspects. Limitation of time and the original wide scope led to rethinking moment how to get thesis aligned. After having a conversation with thesis and company X supervisors, the scope get narrowed to only. The guide has been limited to the MA implementation process and the assumption that the customer has a basic understanding of why MA is needed and how it works.

The biggest learning was to understand how limited the customer visibility into implementation project is, especially if the customer doesn’t have any knowledge about MAS.
References


Appendices

Appendix 1. MAS implementation guide (confidential)
Appendix 2. Interview cover letter

Dear (Name),

My name is Edvin Kissel and I am Solution Consultant at a company X. I'm working on my master’s studies thesis on a marketing automation topic. The purpose is to create a marketing automation implementation guide that goes through all implementation steps and tells what needs to be done before getting to the actual implementation phase.

I would be happy to interview you as company Y marketing automation specialist to get the beneficial knowledge from you. Of course, you will receive interview questions in advance. At the end you will receive a copy of the guide for your company needs.

Would you like an hour’s interview? How does your schedule look for the next week?

Best regards,

Edvin Kissel
Appendix 3. Interview questions to customers

1. What do you think are the most important things about implementing MA (Marketing Automation) solution?

2. What kind of professionals MA implementation team needs (from company X and from the customer side)? What internal communication challenges have you faced during implementation?

3. What kind of systems MA should be integrated into?

4. Which MA features are the most important?

5. MA KPIs. What are the most important KPIs for the customer?

6. Opt-in & Opt-out process. What to consider in the case of MA?

7. Company marketing activities and how well are they generally aligned with MA processes?

8. Which marketing channels are the most important in MA?

9. How does GDPR appear in MA solution design?

10. How the data model should be designed for MA solution?

11. User stories and their importance in MA implementation

12. Migration of data to MA. What to consider?