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**ALIGNING MARKETING AND SALES –
THE CASE OF MARKETING
AUTOMATION IN FINNISH B2B
COMPANIES**

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ABSTRACT

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People are spending increasing amounts of time in digital channels and making purchasing decisions online. During recent years marketing has been under increasing pressure to adapt to this changing customer behavior. The megatrend of digitalization poses new possibilities and threats to all business units, but especially marketing and sales need to find new ways to interact with customers in digital channels. New products are continuously introduced in the marketing technology field, and companies are facing tough decisions on how and what technologies they should invest in to enhance their customer experience and operational effectiveness of marketing and sales. One of the most talked concepts in marketing at the moment, especially in B2B domain, is marketing automation. At the same time, almost every company claims to aim for a customer-centric organization and service experience. Becoming customer-centric requires seamless alignment of marketing and sales, and the early evidence from the field of marketing automation suggests that marketing automation can act as an integrator between marketing and sales to enable that alignment.

The purpose of this research is to identify, analyze and categorize what kind of problems Finnish companies encounter when aligning their B2B marketing-sales interface with a marketing automation system. In addition, this research aims to clarify what does a successful marketing automation adaption require in the marketing-sales interface. The theoretical framework of the research is formed from the scattered research field of marketing-sales alignment. Mostly unresearched field of marketing automation and the field of technology as an integrator of marketing and sales are also present in the theory section for better understanding of the context.

The research was conducted as an inductive qualitative case research with open and semi-structured interviews. A grounded theory approach was applied for data generation and analysis, where these two phases complemented each other in parallel. Six marketing consultants and six in-house organization experts were interviewed for this research.

The key dimensions where Finnish companies seem to face troubles when aligning their sales and marketing with a marketing automation system can be broadly categorized under vision, culture, structure, process and people. Under these dimensions the success themes that emerged from the interview data, by the means of grounded theory, were top-management team, development prioritization, expectations management, data-driven culture, marcomms and sales structure, integrators, metrics, content production and distribution, roles and language, sales activities, customer knowledge generation, knowledge dissemination, incentives and rewards, and training and hiring of people. These themes are the ones that a company planning on investing in a marketing automation platform should revise.

The findings of this research indicate that companies aligning their sales-marketing interface with marketing automation system face several aspects that need to be addressed, or the return on investment of a marketing automation system may turn out poor. The findings also support that a marketing automation project should be treated as a business development project, not merely a technology project.

Keywords: Marketing automation, marketing-sales interface, marketing-sales alignment, customer relationships management

The originality of this thesis has been checked using the Turnitin Originality Check service.

CONTENTS

1 INTRODUCTION.....	6
1.1 Marketing in the digital era.....	6
1.2 Information technology as an enabler of marketing development	7
1.3 Purpose of the research and research questions.....	8
1.4 Assumptions and limitations.....	9
1.5 Definitions	11
2 THEORETICAL BACKGROUND – ALIGNING SALES AND MARKETING WITH TECHNOLOGY	13
2.1 Introduction to the theoretical background.....	13
2.2 Marketing-sales interface.....	13
2.2.1 Cultural aspects of marketing-sales alignment.....	19
2.2.2 Structural approach to marketing-sales alignment.....	20
2.2.3 Processes affecting marketing and sales alignment	21
2.2.4 Desired employee skills and attributes in the marketing-sales interface	23
2.2.5 TMT vision & managerial decisions.....	23
2.3 Marketing automation.....	24
2.3.1 Historical perspective.....	24
2.3.2 Contemporary marketing automation.....	24
2.4 Utilizing technology for enhanced marketing-sales interface	27
2.5 Synthesis of the theoretical background	29
3 RESEARCH METHODOLOGY	32
3.1 Philosophical approach of the research	32
3.2 Qualitative research and grounded theory	32
3.3 Case study strategy	33
3.4 Data generation.....	34
3.5 Data analysis.....	38
4 FINDINGS	41
4.1 Key themes for marketing-sales interface alignment with MA.....	41
4.2 TMT vision & managerial decisions guide the alignment.....	42
4.3 Overcoming intuition-based culture	46
4.4 Breaking silos between sales and marketing	47
4.5 Processes to clarify marketing-sales interface workflows.....	50
4.6 Training and hiring staff	59

4.7 Summary and reflections of the interviews	60
5 CONCLUSIONS AND DISCUSSION	65
5.1 Discussion of findings	65
5.2 Research quality and limitations.....	69
5.3 Scientific contribution.....	72
5.4 Managerial implications	74
5.5 Future research opportunities.....	75
REFERENCES	77
APPENDIXES.....	85
APPENDIX 1: Semi-structured interview template	85
APPENDIX 2: Preliminary pitfall matrix compiled from consultants' interviews	86

List of Figures

Figure 1. The assumption of knowledge of the interviewed persons	10
Figure 2. Sales funnel visualization (adapted from Järvinen & Taiminen 2016, 170)...	11
Figure 3. Synthesis of the theoretical background	30
Figure 4. Theoretical framework of building blocks of successful marketing-sales alignment	31

List of Tables

Table 1. Recent research history of marketing-sales interface	15
Table 2. Summary of the dimensions of marketing-sales interface (Hughes et al. 2012; Rouzies et al. 2005)	18
Table 3. MA implementation success factors (Murphy 2018, 4)	26
Table 4. Success factors of technology adaptation in marketing and sales	28
Table 5. Background information of the interviews	37
Table 6. Coded Pitfalls	39
Table 7. Identified critical success themes of aligning marketing and sales with MA grouped under theoretical framework	41
Table 8. Outcome of the research	63

1 INTRODUCTION

1.1 Marketing in the digital era

The digital transformation of society and the economy is forcing organizations to rethink their processes and business models to stay ahead of the competition. Possibilities around digitalization, big data, and more recently artificial intelligence have created a lot of hype, especially in the marketing domain (Dawar 2016). At the same time, marketing methods have been rewritten due to customers moving to omni-channel shopping and digital marketing increasingly taking place from traditional marketing communications channels (CMO Survey 2018). Big E-commerce players have benefitted the most, but these advancements in technology have also permeated processes of the majority of businesses as well (Collins et al. 2017). Practically every business is pondering how to drive their sales and communications into digital channels for better customer experience and organizational efficiency.

Marketing has been especially eager to find usage to these new technologies, with US marketers spending as much as 29% of their annual budget on marketing technology (Gartner CMO Survey 2018). The current average spending on marketing analytics alone is 6.7% of marketing budgets, and it's projected to grow to over 21% during the next three years (CMO Survey 2018). Companies are constantly looking for ways to utilize marketing technology to drive business success. But business success isn't just handed over by buying a technology. Technologies alone are often just empty vessels. They do however enable companies to restructure their processes around them, which can lead to more efficient operations and better customer experience. The final ROI (Return on Investment) of these technology investments is a compound of these benefits reduced by all the hassle around adapting to the new technology, and the monetary cost of the technology as well. At the same time, the technology driven landscape of marketing has led to a situation where the development of core concepts of marketing, such as customer relationship management, are being allocated to IT departments that traditionally haven't been the real experts of it (Rust et al. 2010).

Developing new capabilities around marketing and sales is a necessity for fully utilizing these advancements in technology, to master changing customer behavior molded by the

new digital landscape, and for creating seamless omnichannel experiences for customers. These days, many basic marketing capabilities now require cross-functional coordination between marketing and sales, such as customer relationships management (Moorman & Day 2016, 12). Phenomena of how firms actually develop their marketing and sales organizations and the interface of these two to react to this new landscape, what kind of pitfalls arise and how they are managed, is an area that academic marketing does not know a lot about (Moorman & Day 2016, 15). This study focuses on the alignment of marketing and sales under a technology concept called marketing automation.

1.2 Information technology as an enabler of marketing development

A big leap in marketing organization development with information technology happened in the 90's. During those times, the buzzword was business process re-engineering. Business process re-engineering (BPR) was a comprehensive perspective to organizational design, enabled by IT products, that challenged the traditional departmental or functionally based structures to increase cross-functionality and multidisciplinary thinking (Hammer & Champy 1994). Using new technology, such as CRM and ERP systems, companies were able re-design their processes around their core competences to improve customer value, cut costs and create competitive advantage (Hammer & Champy 1994).

Business process re-engineering was also researched in the discipline of marketing (Lynch 1995). Like BPR, the widely embraced market orientation philosophy emphasizes well-functioning interfunctional interfaces as well (Slater & Narver 1994; Kohli and Jaworski 1990). The typical specialized role of marketing function of that era was challenged, and marketing was suggested to move toward an approach of more cross-functional teams that were nimble in adapting to constantly evolving environment and increasing competition (Lynch 1995).

What is noteworthy in this trend of BPR that emerged in the past is:

- 1) It was initiated by advancements in data technology (such as ERP and CRM systems), and
- 2) it challenged the old and clumsy organizational structures to
- 3) re-organize organizations in a way that they would create superior customer value.

So as the marketing discipline is pondering on how to organize marketing organizations in the most agile way which includes, for example, re-engineering decision making processes and automating routine tasks (Marketing Science Institute 2018) when new technology concepts, such as marketing automation and AI, are making their breakthrough we are basically around the same questions as 30 years ago.

An important thing to notice about this history is that the failure level of CRM investments in late 90's and early 2000 was high (Roberts et al. 2005; Rigby et al. 2002). Even in 2012, their implementation failure rates still ranged from 55 to 75 percent, which means that they resulted in losses or no improvement in company performance (Awasthi & Sangle 2012). Similar failure rates are also documented in sales force automation adaptation projects (Block et al. 1996). Maklan & Knox (2009, 1403) suggest, that the main reason for many organizations failing to meet their ROI targets of these CRM projects was that they did not pay enough attention to developing their organizational capabilities needed to fully utilize the technology. Marketing automation discussion can be seen as a continuum of CRM-technology discussion, since it is a technology in the marketing-sales interface, and advanced automation development also requires integration with a CRM-system for better targeting of communications.

The market size of marketing automation technologies in 2018 was more than 11 billion USD, and it was projected to double within the next 5 years (Sweeney 2018). In 2015, less than 300 Finnish companies had implemented marketing automation systems (Vainu 2019). In 2019, the same number had grown to a staggering 5 929 (Vainu 2019). The significance of the topic is therefore explicit.

1.3 Purpose of the research and research questions

The purpose of this research is to provide insight into elements that make a successful marketing automation adaptation in the marketing-sales interface by identifying, analyzing and categorizing what kind of problems Finnish companies encounter when aligning their marketing-sales interface with a marketing automation system. The research phenomenon under investigation is the changing way of aligning marketing and sales to manage customer relationships, enabled by marketing automation, from the

perspective of strategic planning. This perspective is achieved by interviewing consultants and people responsible of the automation adaptation inside companies. As an outcome, a strategic framework is created to point out themes to be considered in the adaptation process. The research is guided by one research question:

- 1. What non-technical themes companies need to consider when utilizing marketing automation to re-align their marketing-sales interface*

Marketing-sales interface is one of the most important aspects in creating a market-driven organization (Malshe 2011). Previous research provides evidence that technology can enable better alignment of these two, but it also poses a big risks of low ROI investment if not done properly (Maklan & Knox 2009). The methodological approach of this research is grounded-theory, which means that an inductive data-oriented way is applied to analyze and generate the data.

Marketing-sales interface literature provides insights into what general dimensions and themes are needed to be considered for a better functioning marketing-sales interface. Rouzies et al. (2005) present a conceptual framework of dimension where culture, structure, processes and people are evaluated as enablers of marketing-sales interface alignment. This framework is eventually reflected on the findings, and present in the findings section of this research.

1.4 Assumptions and limitations

All implementation projects that involve technology require a substantial amount of technical staff and knowledge to succeed. IT departments have long been established functions of companies with important role to play in managing the IT infrastructure of a company. Marketing automation systems also require technical staff and knowledge to build, manage, develop and configurate it to the IT infrastructure of a company, including configuration to ERP, CRM, web-analytic systems, applications and IoT products. This research leaves the technical perspective of marketing automation outside of the scope and focuses solely on the non-technical attributes affiliated around adapting to marketing automation. This research also tries not to focus on general change management

phenomena, which are prevalent in almost every business project requiring changes to existing methods or processes.

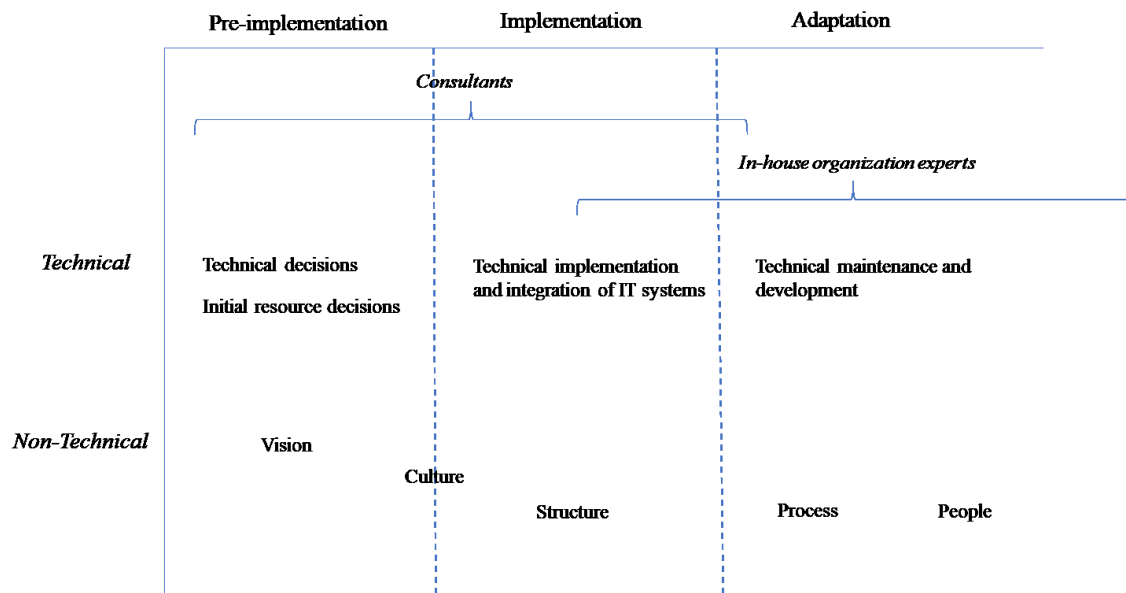


Figure 1. The assumption of knowledge of the interviewed persons

In this research two types of persons are interviewed, that presumably have different perspectives into marketing automation (see Figure 1). Marketing consultants with deep experience of MA implementation and adaptation, and in-house organization experts, who are people with remarkable role in the marketing automation adaptation process of their company.

This research focuses on the B2B side operations of firms. Three of the interviewed in-house organizations are purely B2B, one is mostly B2B with some B2C sales and two are B2C companies. These B2C companies however do have B2B side operations, and the research focuses on these. Interviewed marketing consultants were all experienced in the B2B field. B2B marketing isn't that much researched area compared to B2C marketing, despite its huge economic significance (Lilien 2016, 543). As described by Lilien (2016) in his academic paper charting the B2B marketing knowledge gap: *"The important B2B problems, those worth working on, are the ones that are burning issues for practitioners. And those issues are often ill defined, messy and hard to solve. A desire to work on such real problems is essential for making an impact in the B2B domain."* (Lilien 2016, 544). The burning issue considering the ROI of marketing automation investments in Finnish

B2B scene was also verified by interviewing industry professionals with vast knowledge and experience of the Finnish B2B marketing field, and as the interviews went on more and more evidence that this truly is a significant issue emerged.

1.5 Definitions

In the context of this research, pre-implementation and implementation refers to the technical implementation procedures at the beginning of the project when moving into using marketing automation. Adaptation refers to the transition phase of people starting to work by new ways with the help of the implemented system. Some phases of business adaptation related themes, such as overall vision of to what extent the system is utilized, can however happen at an earlier phase like illustrated in the Figure 1.

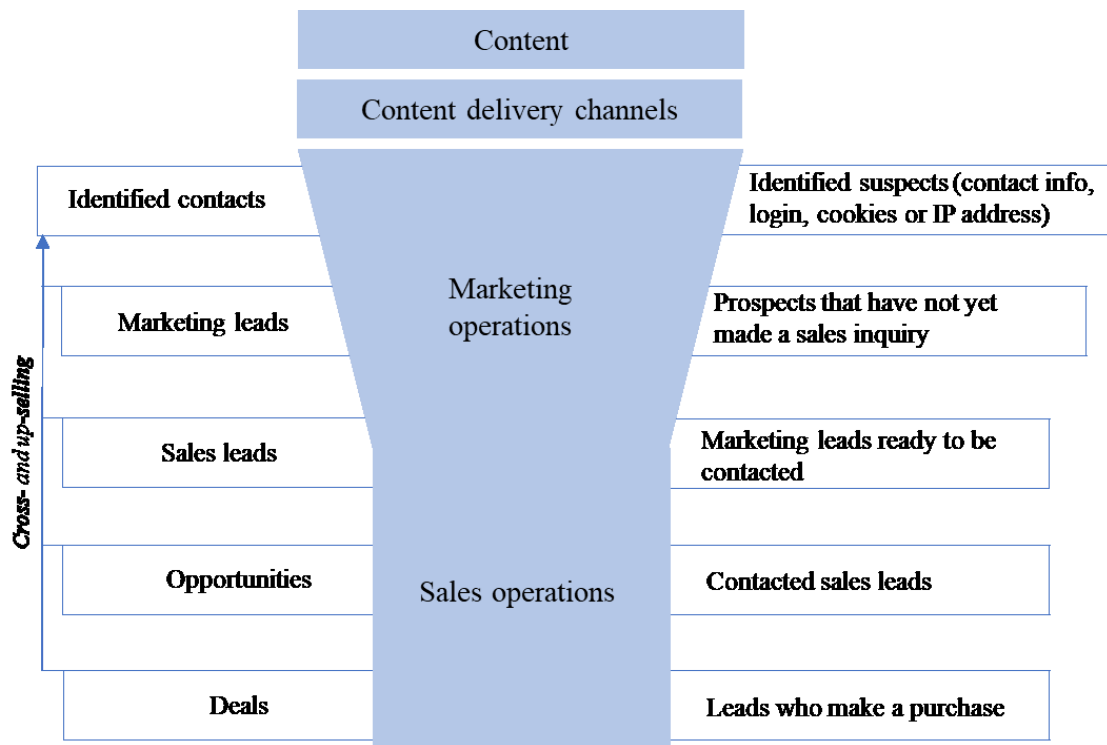


Figure 2. Sales funnel visualization (adapted from Järvinen & Taiminen 2016, 170)

Marketing-sales interface is best defined through the concept of sales funnel (Figure 2). Sales funnel is a concept of how marketing and sales share the customer relationships management process. Customer relationships management refers to acquiring, nurturing and retention activities towards customers. Marketing and sales share this funnel, but where the line between these two is drawn is a company specific matter. In the context of

this research, marketing refers to marketing communications and sales refers to activities that require interpersonal interaction between customer and salespeople.

2 THEORETICAL BACKGROUND – ALIGNING SALES AND MARKETING WITH TECHNOLOGY

“The aim of marketing is to make selling superfluous” – Peter Drucker

2.1 Introduction to the theoretical background

The initial approach of this research was purely inductive, and the process of data generation and analysis is described in the subchapters 3.4 Data generation and 3.5 Data analysis. It means that this theoretical background was mostly written after all the interview data was already gathered and analyzed. The purpose of this theoretical background is to create a lens through which to group the outcome of the analysis, and to provide a framework to bind the findings of the research to existing research. The chapter 2.2 Marketing-sales interface forms the theoretical lens through which the interview data is mostly eventually filtered. The subchapters of the theoretical background 2.3 Marketing automation and 2.4 Utilizing technology for enhanced marketing-sales interface describe the context of the research more thoroughly and from the perspective of how technology can affect the interface. Since there is not yet much research literature on the relatively new topic of marketing automation, chapter 2.4 was brought aside to provide perspectives from technologies affecting the interface that have been around for a longer while.

2.2 Marketing-sales interface

Marketing-sales interface refers to the interfunctional coordination of these two functions, which can be defined as their ability to work and communicate together to create customer and shareholder value (Matthyssens 2006, 335). A successful alignment between sales and marketing can lead to outcomes such as superior customer value (Guenzi et al. 2007), better marketplace strategies (Malshe & Sohi 2009) and improved organizational performance (Rouzies et al. 2005). The very prerequisite for creating a market-oriented organization is to create a functional and aligned marketing-sales interface (Biemans & Makovec 2007; Meunier et al. 2011).

The interface between marketing and sales has been identified as perhaps the most critical of B2B firms' internal interfaces, which is due to its particularly important role in any firm's ability to build relationships with business customers (Malshe 2011, Malshe & Soshi 2009). The constantly changing and demanding customer needs require alignment of sales and marketing for the firm to create customer insight and execute customer-centric tactics and strategies (Malshe & Sohi 2009).

The marketing-sales interface in B2B firms is of great importance, and yet often dysfunctional (Malshe et al. 2017; Kotler et al. 2006). In many B2B firms, misaligned systems, compensation plans and processes, and non-optimal organization structures hinder the co-operation of marketing and sales (Malshe & Biemans 2014). Kotler et al. (2006) present that the confrontations between sales and marketing arise from economic and cultural reasons. The economic conflicts are about splitting the budget in revenue generating activities, which the two often disagree about (Kotler et al. 2006). The cultural conflicts in the other hand stem from marketing and sales both attracting very different types of people (Kotler et al. 2006). Wang et al. (2019) summarize this conflict well – *“Sales plays a critical role in B2B firms by maintaining close contact with customers via personal selling. To the extent that marketing is viewed as detached from the selling process, and spending money on alternatives such as advertising, or otherwise seeming to employ practices perceived as more appropriate to B2C companies, conflict is inevitable”* (Wang et al. 2019, 160).

Table 1 contains some of the marketing-sales interface related research literature that provide insight into elements affecting the functionality of marketing and sales co-operation. The research body implies that there is a lot of elements affecting the successfulness of marketing-sales alignment, and there is also a lot of different perspectives to look at the topic.

Table 1. Recent research history of marketing-sales interface

Study	Objective	Findings	Method	Approach into analysis
Johnson et al. (2019). Interfacing and customer-facing: Sales and marketing selling centers. <i>Industrial Marketing Management</i> .	Examining situations where marketing and sales jointly interact with customers to better understand processes, facilitators, and outcomes of sales-marketing cooperation.	Four factors associated with the temporary nature of the topic (salesperson preparation, marketing preparation, joint preparation, joint follow-up); three aspects of facilitators (marketing, customer and product facilitators); and positive outcomes (marketer and sales representative benefits) as well as negative outcomes (marketer, salesperson, and customer drawbacks).	Qualitative	People
Wang et al. (2019). B2B content marketing for professional services: In-person versus digital contacts. <i>Industrial Marketing Management</i> .	Can content marketing in B2B professional services organizations lead to better marketing-sales alignment.	Content marketing approach can bring sales leads and won opportunities to B2B professional service providers, as well as play a complementary role to the existing sales force. Content marketing offers an opportunity to better align marketing and sales, and develop the role of marketing. Customers engaging with content marketing related activities can increase the amount of leads	Quantitative	Quantitative effect on performance
Malshe et al. (2017). Understanding the sales-marketing interface dysfunction experience in business-to-business firms: A matter of perspective. <i>Industrial Marketing Management</i> .	Researching how sales and marketing people perceive sales and marketing interface dysfunctions on individual level.	The dysfunctions that arise in marketing-sales interface are experienced differently by salespeople and marketing people. Most common reasons for dysfunctions are about: lack of collaboration, overt conflict and communication paucity.	Qualitative	People
Järvinen & Taiminen (2016). Harnessing marketing automation for B2B content marketing. <i>Industrial Marketing Management</i> .	A descriptive approach to demonstrate the organizational processes around content production and how marketing automation can be used to integrate marketing communications with B2B selling processes.	First study to demonstrate how marketing automation can be used to integrate content marketing with selling processes, eventually leading to business benefits. The empirical framework created, which utilizes marketing and sales funnel, is done from high-involvement and long-lasting purchase decision perspective. The study finds that integrated sales and marketing funnel fosters better cooperation between the two and increases transparency to both ways.	Qualitative	Process
Sabnis et al. (2013). The sales lead black hole: On sales reps' follow-up of marketing leads. <i>Journal of Marketing</i> .	To examine factors in marketing-sales interface that affect the lead pursuit of sales	By developing appropriate uses of managerial tracking and prequalification procedures firms can enhance their sales funnel performance.	Quantitative	Process
Hughes et al. (2012). The marketing-sales interface at the interface: Creating market-based	Examine how the sales-marketing interface affects other functional	Framework identifying key levers to be integrated by cross-functional cooperation. The synergistic levers are about vision, process, alignment, knowledge, information, decision, resources and culture, and they must be	Qualitative.	Conceptual framework

capabilities through organizational synergy <i>Journal of Personal Selling & Sales Management.</i>	areas when developing key organizational capabilities.	shared across the sales-marketing interface, as well as other interfaces within the firm.		
Malshe (2011). An exploration of key connections within sales-marketing interface. <i>Journal of Business & Industrial Marketing.</i>	To research the boundary conditions that may affect the structure, language and processes that create sales-marketing interface, and to identify other additional factors affecting the interface.	Verifies the importance of language, structure, process artifacts, philosophical and social linkages influencing the strength of sales-marketing alignment.	Qualitative	Mixed. Structure, Process, People and Vision.
Le Meunier-Fitz et al. (2011). Exploring the relationship between market orientation and sales and marketing collaboration <i>Journal of Personal Selling & Sales Management.</i>	Research the relationship between market orientation and marketing-sales alignment.	Marketing and sales collaboration have a positive relationship with market orientation. Market orientation and marketing-sales alignment also has a combined positive relationship with firm performance	Quantitative	Quantitative effect on performance
Biemans et al. (2010). Marketing–sales interface configurations in B2B firms. <i>Industrial Marketing Management.</i>	Investigating marketing-sales configurations in B2B companies	Four categories of marketing-sales configurations identified, which can be seen as evolutionary stages. These different types are however appropriate to certain types of organizations, and it isn't meaningful for all organizations to pursue more complex interfaces.	Qualitative	Categorization of different types of configurations
Malshe (2010). How is marketers' credibility construed within the sales-marketing interface? <i>Journal of Business Research.</i>	To examine sales-marketing interface problems from a point of view of marketers' credibility in salespersons eyes.	Marketers credibility in salespersons eyes, which then affects the sales-marketing interface, is evaluated by themes of expertise, trustworthiness and interpersonal proximity.	Qualitative	People
Le Meunier-Fitz et al. (2010). Improving the relationship between sales and marketing. <i>European Business Review.</i>	Explore the sales-marketing interface to identify elements influencing sales and marketing collaboration.	Sales and marketing collaboration are affected by two types of factors, internal and external ones. Three outside the control of sales and marketing staff; interdepartmental culture, structure and orientation and management attitudes to coordination. Four internal ones; inter-functional conflict, communications, market intelligence and learning.	Qualitative	Mixed. Culture. structure and people

Malshe (2009). Strategic sales organizations: Transformation challenges and facilitators within the sales-marketing interface. <i>Journal of Strategic Marketing</i> .	To research sales representatives and marketing personnel's perceptions about their own and their counterpart's role in marketing-sales interface.	Unveils two factors facilitating sales-marketing interface: role-related and process-related.	Qualitative	People
Dewsnap & Jobber (2009). An exploratory study of sales-marketing integrative devices. <i>European Journal of Marketing</i> .	Exploring integrative factors of marketing-sales interface	Marketing-sales alignment arises from differing perspectives and orientations. Integrative devices enhance the functionality of marketing-sales alignment.	Qualitative	Structure
Biemans et al. (2007). Designing the marketing-sales interface in B2B firms. <i>European Journal of Marketing</i> .	To explore marketing and sales interface.	Marketing-sales interface differs depending on the organization. However, the interface needs to be effective for an organization to be market oriented.	Qualitative	Categorization of different types of configurations
Massey & Dawes (2007). Personal characteristics, trust, conflict, and effectiveness in marketing sales working relationships. <i>European Journal of Marketing</i> .	To test how trust affects conflict in marketing-sales interface	The relationship effectiveness and conflict are explained by both affect based trust and cognition-based trust.	Quantitative	People
Beverland et al. (2006). Cultural frames that drive sales and marketing apart: An exploratory study. <i>Journal of Business & Industrial Marketing</i> .	To examine what keeps marketing and sales functions apart from a cultural point of view.	Differing beliefs about the valid sources of knowledge, scope and focus of activity, differences in perceived status, time focus and the relationship to the business environment all drive sales and marketing conflicts.	Qualitative	Culture
Smith et al. (2006). A three-stage model of integrated marketing communications at the marketing-sales interface. <i>Journal of Marketing Research</i> .	To examine the effect of coordinated communications of marketing and sales on revenue and profit.	Improved collaboration between marketing and sales can offer significant positive effect on firm performance.	Quantitative	Quantitative effect on performance
Rouziès et al. (2005). Sales and marketing integration: A proposed framework. <i>Journal of Personal Selling & Sales Management</i> .	Identifying common impediments to marketing and sales integration.	When integrating sales and marketing, firms should especially pay attention to: Structure, processes, people and culture. Many actions can be used to improve the integration of sales and marketing, which result to firm performance.	Conceptual framework based on existing literature	Conceptual framework

The investigation to recent research history of marketing-sales co-operation reveals roughly five different approaches into researching the marketing-sales interface. These approaches are 1) the high-level conceptual framework approach, that revises past literature to clarify the big picture of marketing-sales interface. 2) Categorization of different types of configurations, that present that the context of the company greatly influences how marketing and sales are aligned. 3) One that focuses on one dimension such as culture or process. 4) A mixed approach with more than one dimension in focus, that is trying to clarify the big picture through interviews. 5) One that quantitatively measures the effects of marketing-sales alignment on firm performance. The perspectives of previous literature review research done by Rouzies et al. (2005) and Hughes et al. (2012) were utilized in this categorization.

Table 2. Summary of the dimensions of marketing-sales interface (Hughes et al. 2012; Rouzies et al. 2005)

TMT vision and managerial decisions	<ul style="list-style-type: none"> · Clear and shared vision · Top management support and commitment
Organizational culture	<ul style="list-style-type: none"> · Data-driven culture · Microcultures of sales and marketing
Organizational structure	<ul style="list-style-type: none"> · Cross-functional structures · Decentralizing the corporate structure · Integrators
Organizational processes	<ul style="list-style-type: none"> · Communication processes · Integrated goals · Incentives · Content-marketing approach
Employees	<ul style="list-style-type: none"> · Open-minded team players

Rouzies et al. (2005) present an interesting conceptual framework on how to align sales and marketing, and it also works as the main framework of the conceptual model of this research. They suggest that several managerially controllable policies and actions can be used to improve marketing-sales alignment (Rouzies et al. 2005). They list four types of dimensions to pay attention to when improving marketing-sales alignment: structure,

process/systems, culture and people. The other framework utilized in the creation of the model of this research is the one by Hughes et al. (2012), identifying key levers of vision, process, alignment, knowledge, information, decision, resources and culture affecting the marketing-sales cooperation. The framework of Huges et al. (2012) is very similar to the one by Rouzies et al. (2005), but it provides some good complementary insights into it. Table 2 summarizes the dimensions and themes affecting marketing-sales alignment, discovered by previous research and summarized by Rouzies et al. (2005) and Hughes et al. (2012). Next chapters elaborate on these dimensions.

2.2.1 Cultural aspects of marketing-sales alignment

Organizational culture is the common norms and beliefs that are shared by members of an organization (Schein 2017). Researches have made many definitions and models about culture, since it's been studied for a long time by management scientist, anthropologists and sociologists (Schein 2017, 3). One way to analyze culture is by dividing it to macro- and microcultures. Macroculture refers to a large organization-wide culture, microcultures are subcultures that can occur inside a macroculture (Schein 2017,3).

Marketing and sales functions can both have their own microcultures that impact the functionality of their shared interface (Beverland 2006; Le Meunier et al. 2010). For example, microcultural approach is present in the research by Beverland et al. (2006), where the researchers investigated cultural frames driving marketing and sales apart and found that differing beliefs about the valid scope and focus of activity drive the two functions apart. This research however does not focus on the separate micro-cultures mediating the interface alignment but acknowledges their possible presence and effect. To research these microcultures, staff from marketing and sales should be interviewed, which is not the interview group chosen for this research.

The cultural dimension of marketing-sales alignment in the context of marketing automation is focused on the more organization- and even society-wide macrocultural transformation from intuition-based to data-driven decision making culture. Organizations hoping to gain value from utilizing data in their business processes should have a culture and leaders that support that culture (Wedel & Kannan 2016, 116). Regardless of huge investments to data and technology, most of the world's leading

companies haven't yet managed to bring data-driven culture to their organizations (Bean & Davenport 2019).

2.2.2 Structural approach to marketing-sales alignment

Firms are generally moving away from service and product groups, and replacing them with team structures that are focused on specific customer segments (Moorman & Day 2016, 18). Homburg et al. (2002) present that customer focused organizations organize firm activities by groups of customers related by usage situation, application or industry. These kinds of structures can improve firm's knowledge over their target customers (Satish et al. 2005). It can also lead to better identification of possible growth opportunities (Day 2006).

Some structural perspectives recognized by previous research to improve sales and marketing alignment are structures that support cross-functionality, decentralizing the corporate structure and using integrators (Rouzies et al. 2005).

Centralization refers to the structure of decision-making authorities in an organization, and how far they are located from separate functions (Aiken and Hage 1968). Centralization might increase conflict and reduce connectedness between functions (Menon et al. 1997). Whereas decentralized structure can enhance cross-functional communication and resource sharing, centralized structure usually creates tension between functions (Rouzies et al. 2005, 116).

Cross-functional teams is another structural way of improving the marketing-sales interface (Johnson et al. 2019). The formed teams can be tasked to address specific issues or to perform on different activities, such as managing the sales funnel process, which should increase understanding towards each other's roles in that specific activity. However, different perspectives and backgrounds of sales and marketing staff might also create a ground for conflict (Kotler et al. 2006). According to some research, cross-functional teams might not always lead to enhanced performance, but they need training and rewards to support their cooperation and lower the probability of conflict (Gladstein & Caldwell 1992).

Improving marketing and sales alignment can also be done by hiring integrators, employees with special role of working in the interface of the two functions. Weitz and Anderson (1981) recognized themes affecting the effectiveness of integrators in their research. These themes were recognizing goals and perspectives of both sales and marketing, their established mandate, and skills for resolving arising conflicts, and using their unique skills and knowledge instead formal authority to drive influence (Weitz & Anderson 1981). Integrators may facilitate the alignment of marketing and sales interface, but it also increases labor costs due to the need for hiring integrators. Therefore, using integrators should probably be limited to transition phases, such as launching a new product (Rouzies 2005, 117) or implementing a marketing automation system.

2.2.3 Processes affecting marketing and sales alignment

Some process perspectives discovered by the previous research to improve sales and marketing alignment are enhanced communication processes, integrated goals and incentives (Rouzies et al. 2005). More recent research literature suggests that content marketing -approach to digital marketing communications also improves sales and marketing alignment (Järvinen & Taiminen, 2016; Wang et al. 2019).

Communication is one of the main drivers of cross-functional integration, and it can be categorized into formal and informal types of communication (Rouzies et al. 2005, 118). This research focuses on the formal type of communications, since it can be developed by management by placing different kinds of defined processes and procedures of information exchange into an organization. Information flow between departments is extremely important for shared understanding, market responsiveness and organizational learning (Duncan & Moriarty 1998). Formal communication is an effective way of disseminating market intelligence (Maltz & Kohli 1996, 57-58). One example of formal communication is a salesperson putting information about a customer meeting into a companywide CRM-system, another one would be a weekly meeting between sales and marketing staff.

Oliva (2006, 396) presents that there is a huge language barrier between marketing and sales that is hindering their communication and co-operation. Essentially it starts with as

fundamental thing as the description of marketing and sales, which many companies are not able to clearly define (Oliva 2006, 396). Another undefined and obscure term which plays a big role between many sales and marketing functions is “lead”, and more importantly a qualified lead, which refers to a lead that is ready to be transferred from marketing to sales (Oliva 2006, 396).

Within a firm with several departments, integrated goals align interests of employees’ cross-departmentally (Fisher et al. 1997). Sales and marketing could have integrated goals in customer relationships management, such as increasing market share on a particular market area or with a specific target audience. The efforts of both functions toward shared goals needs however to be made transparent. Analytic investigation and quantification of the impact of how marketing activities turn into qualified leads, and then optimizing and visualizing it, is what the best of the best organizations do, and it ties sales and marketing functions together (Oliva 2006, 398).

Reward systems is also a way to facilitate the integration between marketing and other functions (Menon et al. 1997). Marketing-sales integration can be enhanced with incentives that focus on achievement of goals that are shared between the two (Dewsnap & Jobber 2000). Oliva (2006, 397) presents that if the joint efforts of marketing and sales isn’t translated into sales force compensation structures, it will only create internal friction between the two functions, since sales is more of a dollar driven function than marketing.

A widely spread approach to B2B marketing communications, the content marketing approach, has been presented to enable marketing to claim a new role in aligning selling and buying (Cespedes & Heddleston 2018). Järvinen & Taiminen (2016, 164) define content as all the forms of digital content that the company creates and shares with an objective of affecting customer’s purchase decision. The trend behind companies moving into inbound content creation is that B2B buyers are relying heavily on online information when making purchase decisions (Adamson et al 2012). Whereas in the past salespeople had an important role in helping customers to conceptualize their problems, these days companies are much more advanced in defining their own problems and possible solutions (Adamson et al 2012). Moving to an inbound content marketing approach might therefore require new processual refinements between marketing and sales on how to address the purchase paths of customers.

2.2.4 Desired employee skills and attributes in the marketing-sales interface

Rouzies et al. (2005) present that to cultivate the alignment of marketing-sales interface, hiring and promoting open-minded team players to sales and marketing is important. For example, marketing managers that understand the importance of working with engineers to obtain objectives perform better than those that embody coercive behavior in their relationships with engineer function employees (Fisher et al. 1997).

Training existing staff and hiring people with specific skills is probably necessary when moving towards more data-driven organizations, since it poses challenges to the marketing-sales interface that hasn't been present before, and therefore not documented on the older research literature. The CMO Survey (2018, 49) presents that 18% of CMO's report marketing technology platform experience, such as marketing automation, being the most important skill prioritized when hiring new marketing talent.

2.2.5 TMT vision & managerial decisions

A fifth dimension of the theoretical model is about top management team vision and managerial decisions, which isn't listed in the original framework from Rouzies et al. (2005) but is present in Hughes et al. (2012) research. The need for TMT vision and right managerial decisions was something that arose strongly from the interview data and was therefore added to the framework. Vision was also stressed in the research done by Järvinen and Taiminen (2016) as one of the main drivers that supported the adaptation to marketing automation.

A well-crafted and clear vision motivates staff to work harder toward a common goal (Hughes et al. 2012, 61). A shared vision enables the firm to respond to changes in dynamic marketplace by aligning its resources (Wiersema & Bantel 1992). It is of great importance that marketing, sales, and all the other departments of a firm share the same vision (Guenzi & Troilo 2006). Good managerial decisions on the other hand, closer to day-to-day reality, and optimally guided by the vision, require availability of accurate information, business environment sensitivity, rationality and common goals appreciation (Dean & Sharfman 1996). Vision is to be decided or at least approved by the top

management, whereas managerial decisions are the small steps toward or away from that vision.

2.3 Marketing automation

2.3.1 Historical perspective

Technologies relating to automation of marketing processes in organizations were discussed in the academic literature already in 1960s, but the modern approach to marketing automation has existed for only a few years (Vecchia & Peter 2018, 117). The original meaning of marketing automation concerned automatic information gathering from distribution chains and channels (Goeldner 1962; Head 1960). Before that, it was not economically reasonable to manually gather and comply that kind of information. According to the very first researchers of marketing automation the main perspective for utilizing marketing automation was to drive profitable growth, which in practice meant utilizing information from distribution chains and channels to improve cost efficiency of distribution (Goeldner 1962; Head 1960).

Advancements in technology, changes in business environment and customer buying behavior, and the overall obscurity of the term marketing itself has inevitably changed the meaning of marketing automation from those times.

2.3.2 Contemporary marketing automation

According to the Dictionary of Marketing (2016), marketing automation is “*A software system that enables the automated management and measurement of repetitious marketing tasks and workflow across a wide range of media during the execution of marketing campaigns*”. Parts of tasks such as lead generation, customer relationships management, cross selling, segmentation and measurement of marketing return on investment can be automated with a marketing automation system (Dictionary of Marketing 2016). To be used to its full potential marketing automation system requires integration with data sources, such as client database, ERP-system and web analytic tools. For B2B companies utilizing automation system enables better customer lifecycle management, better measuring of return on investment and claiming a leadership role in

lead management (Dictionary of Marketing 2016). Vecchia and Peter (2018) define marketing automation as “*Driven by the broader agenda of digital transformation, Marketing automation combines a series of marketing technologies, including CRM and e-mail marketing, to design and implement automated processes based on data analytics that trigger use cases and orchestrate campaign plans, content assets and channel execution*” (Vecchia and Peter 2018, 128). Even in modern marketing the definition of MA isn’t that clear. Dictionary of Marketing (2016) delimits marketing automation as a software system, whereas Vecchia and Peter (2018) define it as a series of marketing technologies. Dictionary of Marketing delimits marketing automation to marketing campaigns, whereas Vecchia and Peter describe it as a way to manage channel execution. This research focuses on ways of automating parts of sales-marketing interface, utilizing a productized marketing automation -product in customer relationships management, but acknowledges that the scope of marketing automation can span way beyond this context.

The effect of marketing automation to organizations isn’t yet a much-researched area. Most of the materials concerning this marketing technology are either studies made by companies providing those products and services, or academic papers focusing on tactical issues like measuring the impact of personalization (Murphy 2018, 2-3). Murphy (2018) presents that there is already a gap between companies that successfully adapt to marketing automation and those who fail in the adaptation process. He reviews the available small amount of literature and publicly available research, identifying the key success factors for marketing automation success, which he boils down to seven key antecedents. The antecedents are distributed in a way that three of them are found in pre-implementation stage, three in post-implementation stage and one spanning both. The listed antecedents are: Implementing new business processes, correctly scoping the implementation project, availability of the correct human resources and expertise, gaining organizational buy-in, continuing investment, creating customer-centric content, and the setting of realistic expectations (Table 3).

Pre-implementation	Post-implementation
Have correct human resources	
Review and update marketing and business	Customer-centric content
Scope the requirements of implementation correctly	Continue to reallocate efficiencies
Gain organizational buy-in	Set realistic expectations

Table 3. MA implementation success factors (Murphy 2018, 4)

Vecchia & Peter (2018) also conduct a literature review, identifying the major components of successful marketing automation projects. On a general level, in order to automate processes in marketing, an organization needs to have detailed knowledge about the customer/purchase path, data/information such as CRM data, user behavior or purchasing history in a defined format and a marketing automation software (Vecchia & Peter 2018, 118-119). Organizations adapting to automation systems are however faced with multiple business challenges, mostly occurring in marketing and sales departments and their interface (Vecchia & Peter 2018, 119-121).

One of the few qualitative scientific researchers about marketing automation adaptation is one by Järvinen and Taiminen (2016), where they look the topic from the point of view of content strategy in their case study, claiming to be the first research to demonstrate how content marketing strategies can be integrated with selling processes using marketing automation. They present that marketing automation works as an integrator between content marketing and B2B selling processes to enable more valuable and timely content (Järvinen & Taiminen 2016). In their case study, they present marketing automation as a medium that enables more market-driven organization by better aligning processes of sales and marketing (Järvinen & Taiminen 2016). Redding (2015, 264-265) makes similar remarks, presenting that marketing automation can work as a glue between marketing and sales to help B2B firms become more customer centric. He however outlines that

technology alone isn't going to do a thing, but it can work as a framework to build better practices for sales and marketing co-operation (Redding 2015, 264-265).

2.4 Utilizing technology for enhanced marketing-sales interface

In general, the link between individual performance and information technology was a key concern of researchers researching information systems already in late 1970's. Early researchers like Lucas (1975; 1981) and Robey (1979) presented that the main drivers for information technology utilization were user attitudes and beliefs. Another early perspective emphasized the perspective of how well the technology fits the tasks that it is supposed to support (Benbasat et al. 1981). Researchers Goodhue and Thompson (1995) brought these two perspectives together in their model called Technology-to-Performance Chain, which essentially presented that for an information technology to have a positive impact on individual performance, the technology must be used and it must fit well with the tasks it supports. Reflecting this information systems research into marketing-sales interface literature, the individual themes presented in Chapter 2.2.4 like open-mindedness probably resonate with the technology to performance chain technology utilization perspective. The task to technology fit on the other hand could probably be developed by refining better processes that support the value that the technology can offer.

The usage of technology is however influenced by several other themes as well, such as top-management-team commitment to support the adaptation of the use of new technology. In general software projects have been found to be negatively affected by lack of top management support and commitment (Whittaker 1999; Cascio et al. 2010). Market orientation of a company also seems to play a big role in if the company starts using IT systems in their customer management processes in the first place (Wang et al. 2013). IT systems therefore seem to function as natural mediums to develop marketing capabilities of an organization. Both top management support and market-oriented structures like key-account-management structures are presented in the marketing-sales interface literature as well (e.g. Hughes et al. 2012; Homburg et al. 2002).

Information technology has had a huge influence on sales during the recent years, meaning that it has supported organizations in restructuring their sales functions in hopes of more efficiency (Gessner & Scott 2009; Järvinen & Taiminen 2016). But still in 2019

the paths of how and why the use of IT systems affects sales performance in practice remains quite narrowly researched field (Ohiomah et al. 2019). One way to analyze this performance is to look how information technology can affect the management of sales funnel. As presented in Figure 2, sales funnel is often divided between marketing and sales.

Seley and Holloway (2008) talk about inside sales, which is utilizing one or more IT tools to conduct sales tasks remotely, for example, e-mail, via phone, the web and other internet-based technologies. Pursuing leads is one of the most important functions of inside sales (Pullins et al. 2017). On the other hand, Marketing Communications Department has traditionally been partially responsible of generating these leads through web campaigns, trade shows and advertising. Most of the leads generated are however often ignored and never get the required attention from salespeople responsible of closing the sales (D'Haen et al. 2013; VanillaSoft 2014). D'haen et al. (2016) present that one of the main reasons for this inefficiency is improper lead management processes. Since lead management process, or sales funnel management, is one crucial part of the marketing-sales interface, it needs to be addressed for proper marketing-sales alignment. Enhancing the performance of lead management process can be done with developing lead prequalification activities of marketing and implementing suitable managerial tracking methods (Sabnis et al. 2013).

Table 4. Success factors of technology adaptation in marketing and sales

Top Management support	Cascio et al. 2010
Market orientation of the company	Wang et al. 2013
Lead prequalifying and managerial tracking	D'haen et al. 2016; Sabnis et al. 2013
Technology must fit well the tasks it supports & technology must be used	Goodhue & Thompson 1995

Previous research has identified factors that affect the successfulness of adaptation of a technology in an organization (Table 4). To enhance marketing, sales and their interfunctional alignment via technology, these aspects need to be considered.

2.5 Synthesis of the theoretical background

Previous chapters discussed broadly the themes affecting behind marketing-sales alignment, marketing automation success themes and how technology can be turned into organizational performance.

Based on the discussion in marketing-sales alignment chapter 2.2, businesses seem to benefit from aligning sales and marketing. There are many themes that need to be taken into consideration that affect the successfulness of that alignment. Small and early body of research evidence in chapter 2.3 suggests that marketing automation software can be used as a facilitator and enabler of this alignment. Using MA software as a facilitator of marketing-sales alignment does however require certain aspects to be handled for the alignment to be successful. The earlier research concerning technology to performance in sales and marketing also suggest that there are themes to be considered and tackled if the organization hopes to gain benefits from the technology, and many of them resonate with themes in the marketing-sales interface literature, like individual aspects and processual aspects discussed in the chapter 2.4. Figure 3 concludes the themes discussed in the previous chapters from the point of view of marketing-sales alignment literature, marketing automation literature and technology to performance literature. Even though the perspective of the levels differs, there are clearly some shared themes, such as TMT support, individual level aspects, processual aspects and customer/market centricity.

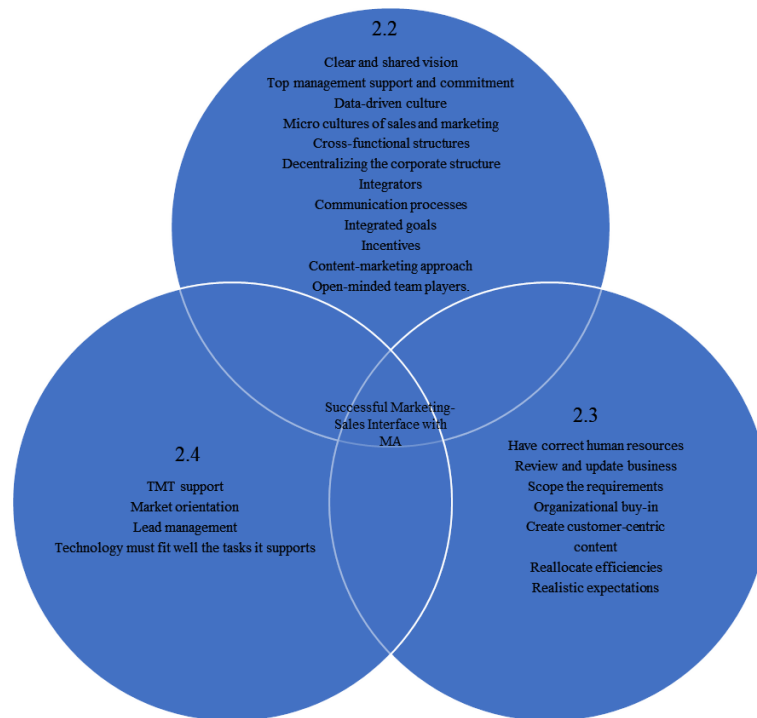


Figure 3. Synthesis of the theoretical background

Previous research has identified success factors for sales and marketing alignment broadly and from many different approaches. The number of conceptual frameworks gathering the evidence and providing a comprehensive perspective to the marketing-sales alignment is however low, and these frameworks have not yet been tested the context of digital customer relationships management and marketing automation. Therefore, this research strives to compile, complement and improve the old and scattered research perspectives.

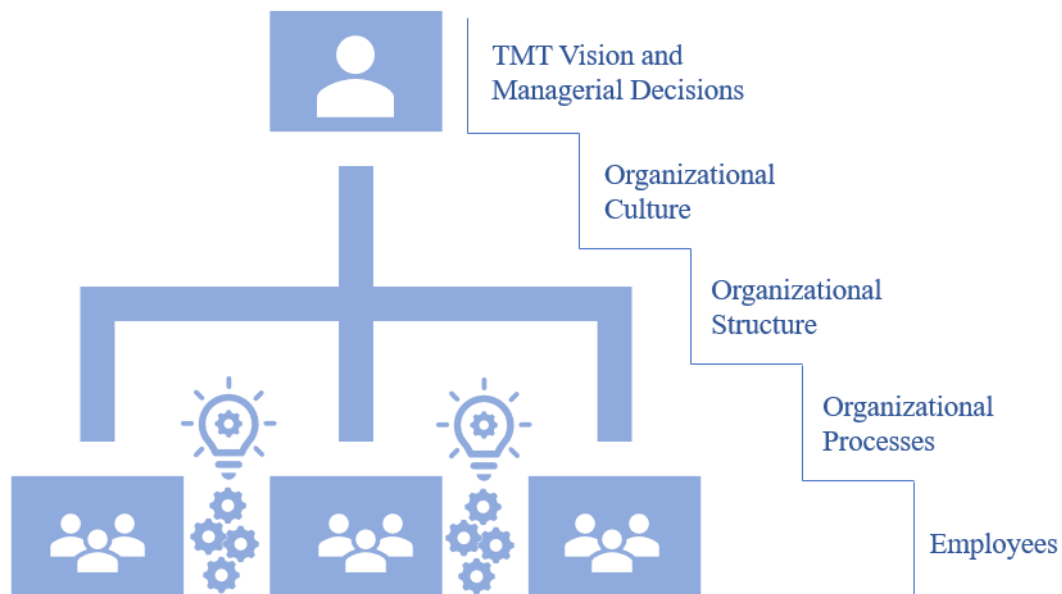


Figure 4. Theoretical framework of building blocks of successful marketing-sales alignment

The conceptual framework of this research is a merger of Rouzies et al. (2005) and Hughes et al. (2012) frameworks (Figure 4). Vision and managerial decisions guide the alignment, culture mediates the effect of everything that is done in an organization, structure creates structural possibilities and boundaries for work in an organization, processes are the defined actions that employees engage into to get their work done, and finally people are the ones doing all the work in practice.

3 RESEARCH METHODOLOGY

3.1 Philosophical approach of the research

Scientific research process requires reasoning. Essentially, the reasoning process can be deductive, inductive or abductive. Deductive reasoning is about reaching logical conclusions with established theory, inductive reasoning is quite the opposite, using empirical evidence as a base and a starting point for generating knowledge (Eriksson & Kovalainen 2008, 33-34). The abductive logic is somewhere in between these two, it's about utilizing both inductive and deductive reasoning in the same research process, iteratively moving between the two logics as the research process proceeds (Eriksson & Kovalainen 2008, 35). This research process starts as purely inductive but moves to a more abductive manner as the number of conducted interviews grows. The conceptual framework of this research, based on existing literature, was brought into the analysis phase after all the research material was already gathered and several analysis rounds already made.

3.2 Qualitative research and grounded theory

This research is conducted as a qualitative research. Qualitative research enables the researcher to focus on complex business-related phenomena in their own context, which sheds light on how things work in real-life business environment (Eriksson & Kovalainen 2008). Qualitative business research also fits for providing critical and reflective insight into core processes of a business. (Eriksson & Kovalainen 2008). According to Ghauri and Gronhaug (2005, 202) "*Qualitative research is particularly relevant when prior insights about a phenomenon under scrutiny are modest, implying that qualitative research tends to be exploratory and flexible because of 'unstructured' problems (due to modest insights).*" Since the phenomenon researched in this study isn't yet much researched, a qualitative grounded theory methodology was chosen as the way to go. Grounded Theory (GT) is a methodology introduced by Glaser and Strauss (1967) for building theory from data. O'Reilly et al. (2012) present that a properly conducted GT should incorporate five elements: theoretical coding, constant comparison, theoretical sampling, theoretical sensitivity and theoretical saturation. All of these elements are

present in this research. Because of this critical and reflective research methodology, it is however important to acknowledge that the decisions made during the research process can greatly shape the outcome of the research (Eriksson & Kovalainen 2008).

3.3 Case study strategy

A case study is probably the most used strategy in researching B2B marketing (Easton 2010, 118). Case studies can differ in ontological, epistemological, and methodological starting points, and these different perspectives can be placed on a continuum from naïve realism to naïve relativism with critical realism and moderate constructionism in between (Järvensivu & Törnroos 2010, 100-101). In this research, the researcher assumes that parts of the themes affecting marketing-sales alignment in the context of marketing automation adaptation can be applied across company- and industry borders, but some themes are more or less dependent on the type of business and organization the adaptation is happening. The perspective of this research leans therefore toward critical realism.

The case study research strategy focuses on creating insight into dynamics appearing in specific settings (Eisenhardt 1989, 534). The specific setting of this research is the adaptation process to marketing automation in marketing and sales. In case study research, the goal is to produce as detailed and intensive information from the chosen topic as possible (University of Jyväskylä 2019). It does not strive to generalizations like survey-research, instead it strives to comprehend and interpret individual cases in their specific settings, achieving some generalizability and transferability by finding insights into the dynamics, mechanisms and processes of the phenomenon (University of Jyväskylä 2019). Conducting a case study, the researcher can use either single or multiple cases and different levels of analysis (Eisenhardt 1989, 534). This research involves multiple cases. Building theory from case study research is extremely iterative, the process requires constant back and forth steps, comparing cross-cases and redefining the research question (Eisenhardt 1989, 546). Case studies may involve either qualitative or quantitative research methods, or a combination of both (Hartley 1994). The research methods in this research, which refer to ways to gather and analyze data (Corbin & Strauss 2008, 1), is a grounded-theory interview study.

3.4 Data generation

An important property of academic research is transparency, which means that the reader should be able to follow the thought process and actions of the researcher (Gummesson 2005, 312). The purpose of this chapter is to cultivate transparency by opening the logic of how the research material was gathered, and the next chapter opens the logic into how the research material was analyzed. The data analysis and gathering phases are parallel processes in this research, which means that the interview template moves from open to semi-structured based on findings, and therefore this chapter and the next chapter 3.5 Data analysis partially overlap.

Both open and semi-structured interviews were used to generate the interview data that this study is based on. Interviews are extensively used by researchers inside and outside of the academic world, making interviews one of the most used methods for collecting data in qualitative style research (Eriksson & Kovalainen 2008, 78; Carson 2001). One of the greatest advantages of approaching the researched topic with interviewing subjects is its flexible nature (Tuomi 2018, 63). The interviewer can clarify and repeat questions, correct misunderstandings and engage in dialogue, and adapt the order of questions according to situation (Tuomi 2018, 63). The interview approach worked well in this study, and it enabled getting rich interview data from a rather broad and unstructured phenomena.

The interviewees of this research were selected using theoretical sampling, which is one of the required elements of GT by O'Reilly et al. (252-253). In practice it meant that extensive experience on marketing automation projects was required from the interviewed subjects. It is important to select experienced people that know about the researched topic as much as possible, making the sample not random but considered and deliberate (Tuomi 2018, 73; Easton 2010, 123-124). According to Corbin and Strauss (2008) theoretical sampling is about gathering data from people, events and places that have the highest potential to provide input that can be used for developing new concepts. Without theoretical sampling it would have been nearly impossible to get information about the topic, since regular marketing- and salespeople would not have been able to answer to the questions, and there aren't that many people that have consulted or

implemented large scale marketing automation systems from strategic perspective for several years in Finland.

Since the researcher's knowledge of the research topic was limited, and people with experience on leading a marketing automation project were hard to find and recruit, a special sampling method called snowball sampling was used to find the recruits. In snowball sampling, the researcher first finds a keyperson or keypersons, who then help the researcher find the right persons, who then help find other recruits (Tuomi 2018, 73-74). Utilizing this technique, the experience level of the interviewee pool was much more extensive and focused than what the researcher could have obtained by recruiting the interviewees without any information or connections. Even though all the consultants and in-house organization experts were experienced in marketing automation adaptation, the maturity level of adaptation in the organizations varied a lot.

The research process started with researchers own observations in the business life that implementing a new technology can be painstaking and require a lot more than just the technical implementation. As a marketing student, this led the researcher to do background research about marketing technologies in the marketing field. Digital transformation of organizations appeared to pose many challenges to organizations, but due to researchers limited knowledge of the field, limiting the scope of the research into dealing with a relevant business issue was hard. To tackle this problem, the researcher contacted two experts in the field of digital marketing technologies and had two sparring sessions with each of them about how technologies can be turned into organizational performance and what kind of problems arise at the moment when it comes to marketing technologies in the Finnish B2B sector. One of the five elements of GT described by O'Reilly et al. (2012) is theoretical sensitivity, which means that when entering the research settings, the researcher shouldn't have any predetermined ideas or hypotheses about it (O'Reilly et al. 2012, 254-255). Based on those sparring sessions, the topic of marketing automation emerged. According to the interviewed persons, a lot of Finnish B2B companies struggle in getting results from their marketing automation investments.

To understand the mechanisms that influence the successfulness of marketing automation implementation, and to increase researcher's information of the topic, six consultants with extensive MA implementation experience were then interviewed. An open interview

approach, where the interviewees were asked to describe themes that are required for a successful MA implementation was used in the first three interviews. After analyzing these interviews, a semi-structured template was created to guide the interviews more quickly into the relevant topics. After conducting all the interviews, the interviews were again analyzed for more insights. A Framework of the pitfalls and how to bridge them in marketing automation from the consultants' point-of-view were then compiled based on this analysis (Appendix 2).

From the very first interviews it was evident that the automation adaptation projects were long projects and getting information only from consultants would lead to a bias towards consultants' point of view, which would not present a comprehensive picture of the phenomena. Using multiple perspectives in a research, called triangulation, can be used to clarify and refine findings of a research (Tuomi 2018, 125; Eriksson & Kovalainen 2008, 292). The very essence of triangulation is the idea that a topic can be approached from different viewpoints, and those viewpoints can accumulate into better overall understanding of the researched topic (Tuomi 2018, 126; Eriksson & Kovalainen 2008, 293). One of the four main triangulation types defined by Denzin (1978) is the triangulation of data source, which in the context of this research means that the information is collected from persons representing different point of views. In this research, two different point of views are present; the consultants' point of view (outside) and the business managers point of view (inside). The data gathering, by the means of these interviews, was divided in a way that consultants were interviewed first and the second phase consisted of interviewing the in-house organization experts. Dividing the research process into these two phases enabled gaining information from different points on the pre-implementation to adaptation spectrum (see Figure 1), but interviewing the consultants first also played a major role in increasing the researchers preliminary understanding of the research field.

In the second phase, six business leaders of organizations that had implemented a marketing automation system and had a large role in the overall business implementation of the system were interviewed with a template derived from the consultants' point-of-view marketing automation matrix. The interview template (Appendix 1) was verbalized into asking direct questions that stress the hypothesized required themes based on the

knowledge accumulated by interviewing consultants. The duration of ongoing adaptation to marketing automation of the interviewed organizations ranged from 1 to 4 years.

Even though crucial to marketing automation implementation success, the success theme of “change management” was omitted from the interview template in phase 2. The reason for this is that change management is a theme affecting all change projects and therefore too broad and general issue. By omitting this theme, more interview time could be focused on other themes and bringing up more meaningful insight.

Table 5. Background information of the interviews

Consultants	Level	Interview type	Execution	Length	Industry	
A	Director	1st Open, 2nd Semi-structured	Face-to-face	90min & 60min	Marketing Consulting	
B	Manager	Open	Face-to-face	60min	Marketing Consulting	
C	Director	Open	Face-to-face	60min	Marketing Consulting	
D	Director	Semi-structured	Face-to-face	60min	Marketing Consulting	
E	Director	Semi-structured	Skype Call	45min	Marketing Consulting	
F	Manager	Semi-structured	Face-to-face	50min	Marketing Consulting	
Business leaders in firms adapting to MA	Level	Interview type	Execution	Length	Industry	
	G	CMO	Semi-structured	Face-to-face	55min	B2B & B2C SME Services
	H	CMO	Semi-structured	Face-to-face	45min	B2C SME Services
	I	Manager	Semi-structured	Face-to-face	60min	B2B Large Manufacturing
	J	Senior Manager	Semi-structured	Face-to-face	55min	B2C Large Consumer Goods
	K	Manager	Semi-structured	Face-to-face	45min	B2B Large Media
	L	2 x Director	Semi-structured	Face-to-face	55min	B2B Large Services

The interviews were conducted between January 2019 and September 2019, ranging from one and a half hours to 45 minutes in terms of their length (see Table 5). The interviews were recorded and then transcribed. The transcribed interview data consisted of overall approximately 100 pages of transcribed interviews.

3.5 Data analysis

The data analysis of this research was about utilizing hermeneutic spiral and grounded theory approaches. Hermeneutic spiral refers to that a research process is a dynamic process where the process moves from pre-understanding to understanding, where we interpret and re-interpret the data constantly testing and developing theory (Gummesson 2003, 484-485). The data analysis was therefore a parallel process with the data generation process, one affecting the another. The previous chapter described the data generation process, and this chapter describes the analysis that occurred simultaneously.

Grounded theory is about systematic categorization and coding of the research material (Strauss & Corbin 1990, 24). There is a high risk of distorting the reality when starting a research with predefined criteria and categories in a dynamic and complex area like B2B business (Gummesson 2003, 489). *“As long as the search is directed to an area of interest, patterns will emerge with the gentle assistance of the researcher, not through forcing”* (Gummesson 2003, 489). Therefore, the inductive methodological approach of grounded theory seemed suitable for analyzing this phenomenon and context. An analytical tool of grounded theory called dimensions-properties was utilized in the data analysis. Dimensions-properties is about comparing incidents to classify the data under meaningful categories and sub-categories (Corbin & Strauss 2008, 73). Constant comparison of cases was conducted while analyzing and coding the data, which means that the new research data is constantly compared with data gathered earlier with an aim to develop categories, as instructed in one of the five elements of GT by O’Reilly et al. (2012).

The data analysis started with open coding, which in practice meant analyzing and coding the research data for either pitfalls of where the company had failed, or points where the company had succeeded that seemed relevant to the success of the adaptation. Any kind of points that somehow seemed relevant for marketing automation adaptation were pointed out. These smaller units were then analyzed for properties, such as “TMT not involved” and “Technical-tactic mindset”, and then coded as either a part where the interviewee describes this pitfall or a part where he describes how to bridge that potential pitfall. Then, based on the analyzed properties and dimensions, different categories were created. The categories should represent higher-level themes of the researched

phenomena, enabling the researcher to combine the data by grouping dimensions and concepts (Corbin & Strauss 2008, 159). For example, “TMT not involved” and “Technical-tactic mindset” were placed under the theme of “Strategic emphasis”. Appendix 2 represents the initial framework compiled utilizing this properties-dimension grounded theory approach. One of the five elements of GT by O’Reilly et al. (2012) is theoretical coding, which refers to this process of identifying properties and dimensions for exposing the phenomena.

Table 6. Coded Pitfalls

Pitfall	Frequency
Arbitrary or technical prioritization	10
Overanalyzed cause and effect	4
Fuzzy cause and effect	11
Lack of communication alignment	6
product focused content	5
Lack of content	10
Customer abundance	3
B2B buying process	7
Distrust	3
Intuition based culture	14
hot leads process	5
Lack of incentives	4
Integrator	6
Traditional Marketing Department	10
Knowledge sharing CRM	9
Knowledge sharing F2F	4
Lack of optimization	3
Megalomania	2
Resources	5
Sales process,	5
Language ambiguity	8
Role ambiguity	5
Technical-tactic mindset	8
Technical realities	3
Low prioritization from TMT	15
Lack of training	4

As described in the data generation chapter, this framework of Appendix 2 was utilized to create the pre-understanding for the in-house organization expert interviews, and the

new interview template was built based on it. A similar technique of properties-dimension was utilized in the data analysis of in-house expert interviews as well. After all the interview data was analyzed for several times, the perspective of marketing and sales alignment was brought in as a lens to group the research data. The properties found from both consultants and in-house organization interviews is presented in the Table 6, totaling 169 data points. Table 6 is already trimmed to only present the marketing-sales interface related findings. Aspects considering customer service, product management, sales channels and other innovative use purposes of marketing automation was also present in the interview data, but as they fall outside the scope of this research, they are therefore not presented in this study.

These properties were then grouped under themes presented in the Table 7, such as “Top Management Team” and “Metrics”. The marketing-sales interface perspective was introduced into the analysis to bind the findings into existing research literature.

4 FINDINGS

4.1 Key themes for marketing-sales interface alignment with MA

Overall 169 data points of marketing automation adaptation related things was found from the interview data. Those findings were grouped under 26 pitfalls, which were then grouped under 16 critical success themes. Finally, the 5 key dimensions presented in the theoretical framework; Vision & Decisions, Culture, Structure, Processes and People were used to categorize the critical success themes under the dimension that previous marketing-sales interface has recognized.

Table 7. Identified critical success themes of aligning marketing and sales with MA grouped under theoretical framework

Vision & Decisions	Culture	Structure	Process	People
DEVELOPMENT PRIORITIZATION	DATA DRIVEN CULTURE	MARCOMMS STRUCTURE	METRICS	TRAIN
TOP MANAGEMENT TEAM		INTEGRATOR	CONTENT PRODUCTION AND DISTRIBUTION	HIRE
EXPECTATIONS MANAGEMENT		SALES STRUCTURE	CUSTOMER KNOWLEDGE GENERATION	
			SALES ACTIVITIES	
			KNOWLEDGE DISSEMINATION	
			ROLES AND LANGUAGE	
			INCENTIVES AND REWARDS	

Table 7 presents how the critical success themes, which are discussed in the upcoming chapters, fall under the dimensions of previous research by Rouzies (2005) and Hughes et al. (2012). A more comprehensive picture of pitfalls under these themes is presented at the end of Chapter 4. The upcoming chapters describe the findings on the critical success theme level.

4.2 TMT vision & managerial decisions guide the alignment

Top Management Team

Involving and getting acceptance from the higher management for starting a marketing automation project was considered critically important by all consultants. The consultants were brought into advising the adaptation process either at the very beginning of the project before any technological decisions were made, or after the organization had purchased the technology but were struggling to see any results from it. Regardless of the case, the vision of how the automation will change marketing and sales had to come from TMT or be approved and supported by the it in order to secure sufficient resources and to clearly communicate the importance of change to marketing and sales. The critical role of vision in organizational development is also well documented in the research literature (Whittaker 1999; Wiersema & Bantel 1992; Guenzi and Troilo 2006)

“As the client responsible of purchase, I’ve had the CEO, which makes everything super easy, because if you create that vision for him and engage the top management team, there isn’t any gaps. Then I’ve had the CMO who has been given a mandate, and he keeps the top management team updated. That goes smoothly as well. The third option is the CMO without mandate. Then the number one goal for us is to first design a crystal-clear picture of the future, so that we can engage the top management team, who then after understanding it gives us authorization and investment plan, and we can move forward.”
(Consultant C)

“We usually sell to top management team, CEO, deputy CEO, COO or CSO. And after that we talk with the CMO. The reason for this is that the transformation should be sold one level up so that the things really happen, and everybody gets involved.”
(Consultant D)

Later on, when interviewing the in-house organizations, according to all of them the initial buy-in from the TMT wasn’t enough, but it required the adaptation to be placed and tracked with high priority. In the two smaller organizations both had the person responsible of the automation also sitting in the top management team, which neutralized any communication gaps towards TMT. Organizations I and J lacked a clear vision and support from the TMT which was, according to the interviewees, the main reason why

their adaptation process was moving forward so slowly. Organizations L & K reported solid support from the upper management. Organization L however told that in order to get the solid support, they first had to provide some concrete evidence that the project was starting to make an impact.

“We have had great support from the top management since the start. Marketing automation was initiated by top management, and therefore Marketing doesn’t have to justify it to Sales that much. So, in reality it meant that first they decided that we would start adapting to marketing automation, and when we are evaluating all the ongoing development projects, it is prioritized high amongst all development projects. There has also been somebody from the top management asking where we are going, what kind of results are we seeing and how much progress have we made when reflecting it to our objectives.” (In-house organization K)

“It would also require commitment from the top management and them to require it. Because when there is somebody whose job is to sell and he has sales targets, it doesn’t matter how much you try to explain to him that marketing automation will help him as well when we get it running by providing quality leads, they still struggle to see the big picture. ... We have got some support with our data development project, but none with the marketing automation. Maybe the top management team don’t yet understand or know all the possibilities.” (In-house organization I)

Murphy (2018, 5) presents that the success of marketing automation implementation is highly dependent on the buy-in it gets from the top management, and stresses that achieving this buy-in is mostly a pre-implementation stage issue. The interviews of this research however show that even though the approval of top management team is a necessity to initiate the project properly, marketing automation projects constantly battle on the prioritization agenda with other development projects. This means that securing sufficient resources and support from top management requires a lot and isn’t necessarily possible to achieve before presenting concrete results.

Development prioritization

The development prioritization boils down to the fact that since marketing automation is an information technology product, some organizations see it as a technology project. All

the consultants and the organizations stressed that even though they needed outside help for the technical implementation and development of the system, the technical side was rather straightforward and didn't pose any considerable challenges. The challenges however do rise, according to the consultants, from approaching the marketing automation project as a technical project without any clear objectives of how it should affect the business. Similar issues were present in the CRM-system literature from the last decade as well (Maklan & Knox 2009).

“I claim that ten years ago, when were amongst the very first ones in Finland to starting to utilize automations in marketing, we were a lightyear ahead of these organizations buying right now. Most of them are buying now because they want to follow the hype. They buy because they don't know what they are supposed to do, and because everyone else is doing so.” (Consultant D)

“I constantly bump into cases, where the development hasn't been planned with us, and the client is paying the price for doing the implementation decisions and use cases with IT derived hypothesis with technical requirements. And then the implementation takes surprisingly long time and it's super obscure of what they are really doing with this thing (marketing automation).” (Consultant C)

All of the organizations interviewed did however have many ideas, some implemented and some not, of how marketing automation could be used for the benefit of the business.

“We started the development from simplifying the customer acquisition process of our SME business, that was the first use-case. We had gotten feedback from customers that it is sometimes quite troublesome to buy from us, so we wanted to solve this problem for this segment.” (In-house organization L)

“We started from what was the most easily approachable ensemble with well quantifiable results. Since some segments buying process lasts for a year whereas other segments make the purchasing decisions more quickly, we wanted to start with the quicker ones.” (In-house organization K)

In the interviewed organizations, the decisions made about the specific parts where to utilize automation, the so-called use-cases, were often driven by the easiness of

implementing the use-case in practice and the quantifiability of the numerical results of the use-case. In practice, the use-cases varied a lot between customer acquisition, customer nurturing and customer retention, depending on the organization.

Expectations management

The concept of marketing automation can be quite unclear for those not familiar with it, and it can therefore also cause a lot of misconceptions. When organizations lack the understanding, it can lead to unrealistic expectations. Unrealistic expectations hurt the project, since the scope of resources and time required are underestimated (Adam & Danaparamita 2016). This same issue was also present in the consultants' interviews.

“The expectations in SME companies are usually too high, so you must be clear and honest when you communicate what is possible, what brings results now and what later. When selling the consultation, it's hard to crop the focus reasonably, and not to sell too much at once.” (Consultant E)

“Usually it's at least one and a half years project for your organization capabilities and the role of technology to reach that point that people begin to realize what it's all about and it starts to change the job of sales and people start trusting it. If somebody thinks that they are just going to buy and implement the technology and it's just going to start producing results, they are doomed to fail.” (Consultant C)

All of the consultants mentioned expectations management to be important, otherwise the morale of the employees would be negatively affected and required resources not secured. In the couple large in-house organizations, the person responsible of the implementation mentioned difficulties in communicating the actual scope of the MA to upper management, which inevitably affects the expectations management negatively.

4.3 Overcoming intuition-based culture

Data-driven culture

Since marketing automation requires a lot of information in a defined format, data, it is strongly linked to one of the biggest challenges companies currently face - moving from intuition-based decision-making culture to the data-driven one, as presented by Bean & Davenport (2019). The issue was present in the interviews as well.

“One of the biggest sections that I’m currently trying to push through is the creation of data-driven culture, which is a really long and rocky road ahead. Practically I’m currently pushing that agenda to our top management through my superior. So, I’ve made a proposal that we need to organize ourselves and paused some parts of the development before the TMT really commits to it. There is no purpose of developing the tech stack if we don’t have the culture to support the use of it.” (In-house organization J)

“We are making steps toward data-driven culture, but it comprises a lot more than just marketing automation. But the first real quantifiable results we got from MA that enabled us to verify its importance to sales efficiency, it encouraged our TMT to invest more. So that was a small but important step of making an investment decision based on data.” (In-house organization L)

“Our change to data-driven culture starts from our CEO, who is really data-oriented. He is wearing the “digirope” and constantly trumpets for it. My job is then to make sure that everyone knows what they are doing. It requires repetitions. It’s been about testing, doing things together, “you can’t break it” style encouraging. It’s about making it a commonplace thing. There is no shortcut.” (In-house organization H)

Especially in the larger organizations, MA was only one small part of the overall data-strategy, which means that the cultural change to data-driven decision making is an issue far greater than one just affecting the successfulness of MA adaption. The quantifiable and concrete results that MA was able to present was seen as a big influencer in creating the culture of trusting the data, but also trusting each other’s contribution between marketing and sales staff. This implies that the problems arising in the micro-cultures of sales and marketing documented in the previous research literature (Schein 2017), could

maybe be tackled with the macro-culture of data-driven culture, since it seems to foster transparency between sales and marketing.

An interesting outlier was the company K, which reported that it did not really face challenges in creating data-driven culture. The argued reason for this by the interviewee was that since the company sold a service that, to be able to sell it, required proofing its efficiency via data-driven methods in the first place, created a kind of inner born data-driven culture. The business therefore simply wouldn't run without sales arguments based on data. In this organization, there wasn't any significant bad blood between marketing and sales.

4.4 Breaking silos between sales and marketing

Structure of Marcomms

One of the main structural challenges for utilizing marketing automation to align sales and marketing is the traditional style marketing communications department, that lives in the world of “*50% of our marketing is effective and 50% isn't, we just don't know which part is which*”. This type of department is used to creating top-of-the-funnel material to generic target audience. It's the department that lacks the ability to link its activities to financial metrics and in some cases, have been declared dead and irrelevant in today's customers' decision-making process (Lee 2012).

“... B2B marketing departments have traditionally been roll-up departments. Sales Department has told them to arrange roll-ups and breakfast to trade fairs. Now we are in a situation that marketing department can genuinely be relevant to the firm, since they have an opportunity to discuss about how we can better arrange our customer relationships management.” (Consultant D)

“In B2B organizations, marketing has traditionally been a function that has been set aside and tinkering with its own stuff, and sales have done all the real work. But the world that we are constantly moving toward is one where buyers are active and 60% of the purchasing process is completed before the buyer even contacts the sales rep. This forces the marketing function to grow to a much significant function, since inbound marketing has such an essential role.” (Consultant C)

“Our Marketing Communications Department has a lot skilled workers, but they are mostly focused on branding, preparing for trade fairs etc. But trade fairs would be a great opportunity to utilize marketing automation by nurturing the leads collected. But they don’t have knowledge how to do that, nevertheless time. When they have certain responsibilities and a traditional organization, they are used to that if something isn’t their responsibility, they won’t do it.” (In-house organization I)

Marketing automation driven marketing-sales alignment requires the structure of marketing to become a more cross-functionally operating department, fetching information from people that interact with customers more frequently. In organization L, the one with most advanced utilization of automations, they reported that they didn’t actually even do “traditional marketing communications” before moving into digital world and utilizing automation. The need for new type of marketing communications was answered by content producers, who would be part of the traditional marketing communications department or separate from it, depending on the organization.

Structure of Sales

Interviewed organizations had mostly structured their sales activities by key account management structures and also by the complexness of the buying process of their customers.

Organization K had just before starting the implementation made a structural change to their sales organization, which centralized specific customer groups under same sales teams. The structural change enabled a better approach for a holistic customer relationships management and accumulation of knowledge of specific customer groups. This was also seen as beneficial to MA development, since it facilitated the customer knowledge generation, knowledge dissemination and content production processes. Previous research has also recognized that these kinds of structures increase the customer knowledge of the organization (Satish et al. 2005). Organization K also had an organizational structure where potentially lower-value customers were served under a sales channel of completely separated brand. Their goal was to drive all the sales to digital channels, and they also had their own independent marketing automation development separated from the corporation.

Organization L, the company with most advance marketing automation adaptation, had re-structured parts of its sales for better sales efficiency. Unlike organization K, Organization L made the structural changes after implementing marketing automation and starting to see results from it. In practice, it meant serving customers with fast buying process and already defined needs faster and remotely with a new sales structure instead of old way of always using the field sales personnel to visit the customer. The field sales team could then focus on the customers that really required an on-site meeting. Without this kind of transformation to the structure, many hot leads generated by new MA supported processes would have had to wait for a long time for a sales rep's contact.

Organization G on the other hand was, instead of growing its sales team or organizing its structure, trying to tackle their problem with just adjusting the process. The consultants overall didn't talk much about the organizational structure of sales.

Integrators

In organizations J, K and L the development of automation was not directly under sales or marketing, but under a different function that worked as an integrator between sales and marketing. Organization I on the other hand was suffering because they lacked the integrating force.

"I work in a service function, where I help our different business lines as kind of being an internal consultant. I help our business lines to find their business cases for marketing automation and push them through the adaption ... It's seen as really important, but it's still super slow. And they've (one business line) had a lot of organizational changes and the person responsible of developing the marketing automation left and the role was added under some other guy. That of course slows down the development if there are no real dedicated persons to push things trough." (In-house organization J)

"We have done some right things, but we still lack the "gathering force", marketing automation adaption being under the responsibility of one person. We have done customer journey mapping and we know the pain points and everything, we should just start developing the automation paths. But since it's nobody's responsibility, it just floats in the air. ... we would need somebody to look after it from high enough perspective, since we have such a siloed organization." (In-house organization I)

In all of the organizations that had an integrator, the person acting as one was experienced with automation projects. In the larger organizations, an integrator was seen as an essential to make the marketing-sales alignment by automation possible, since the two functions were so far away from each other with different objectives. In the smaller organizations there wasn't any separate integrators.

4.5 Processes to clarify marketing-sales interface workflows

Metrics

Creating processes verifying cause and effect, meaningful metrics, had two different dimensions. The metrics pushing MA adaptation forward and metrics that aligned the objectives of sales and marketing. The metrics derived from objectives is important in tracking the success of the project and communicating that to the management, which ensures securing resources. Shared metrics of marketing and sales on the other hand can be used to align these two functions. When it came to marketing automation, the interviewed companies used simple metrics. Many companies also emphasized that using too complex or squeamish metrics would not bring any benefits and could instead be harmful.

In many cases marcomms had its own metrics and sales had its own metrics. The most important metric of sales was of course, total sales. Marketing's metrics varied but were mostly top-of-the-funnel metrics.

In organization G, they had noticed that the transparent shared platform of lead management, the MA system, drove marketers to be more interested in tracking what happens to the leads after sales starts working on them. This also made their effort in customer acquisition more concrete, forcing them to pay focus on lead nurturing rather than just generic brand metrics like awareness. In organization K, marketing's budget and where to focus the marketing communications activities were decided directly based on sales objectives.

In organization K, J and I the most relevant metric to track the MA projects was in widening and deepening the contact pool information in CRM system, so that the MA

system would have something to work on. For example, in organization J the adaptation to automation was still in its early stages, and the most important metric was the amount of people that gave the rights for the firm to do marketing communications towards them in digital channels.

“One of the best things about MA is that we can see a real-time situation of the sales pipeline, what is the forecast for this and that. But then I need to bring another perspective, we cannot quantify when a click turns into a euro. What is relevant for us to know, is that during the choosing phase there is 20 clicks before the customer moves into the phase of active purchasing. I totally support quantifying marketing, but I also think that we cannot go too far, because if we start trying to model every click into financial metrics it turns us into short-sightedness.” (In-house organization G)

“We have decided with MA that we do not start measuring everything possible, because we actually have that kind of culture right now where we don’t measure everything and get super anxious if one metric wavers into wrong direction. But since we still are in quite early phases with this, verifying the sales effect is difficult. But we have used simple metrics, like can we widen the contact surface of decision makers between one client organization. So that’s actually one relevant metric we have started to use, since on the B2B side there is so many people affecting the purchase decision and the buying cycles are long.” (In-house organization K)

“We also started with way deeper and meticulous modellings where we defined a lot of variables and how they turn into money. But now we have changed our approach into more simplistic ones, how can we get MA into the use of organization and concretely measure the outcomes. And that means we need to bolt MA into acquisition, nurturing and retention and define those processes.” (Consultant D)

The cause and effect also links to the integrated goals -part mentioned in the theoretical framework (Fisher et al. 1997), since it makes the work of both parties transparent. The objectives focused on building the data capabilities increase the readiness of MA usage in customer relationships management from required information perspective. Common goals and metrics are however needed to push marketing and sales to work towards generating demand in co-operation.

Roles and language

The issues in roles and language between marketing and sales in customer relationships management and inside these two functions boils down to ambiguities in customer acquisition and nurturing. The trend in all of the organizations was that content marketing, supported by MA, was getting increasingly important role in generating and nurturing leads. Therefore, the whole process of acquiring new customers was seen as a shared process between marketing and sales, whereas in the past it was seen as a job of sales with marketing trying to support it somehow. The problems however arise from this past, where the definition and roles in the lead generation process have been unclear, and they need to be fixed before marketing and sales can truly start working together for enhanced customer relationships management. If marketing led inbound content marketing and customer self-service e-commerce gain more significance in the customer relationships management of the company, both marketing and sales need to be well informed what are their new roles and how they communicate in the interface where marketing qualified lead turns into sales qualified lead.

“We usually start by, before the first meeting, sending a survey to both sales and marketing, asking them to describe a marketing qualified lead and a sales qualified lead, and see what we get. I haven’t encountered any organizations where the descriptions match. Usually marketing and sales have totally different definitions for these. And if you don’t know what a definition of a lead is, how can you produce any leads?” (Consultant D)

“One of my clients, who has a really obscure organization model to understand even if you’d work there yourself, marketing performance is measured by qualified leads that have certain criteria. In practice, sales very much disagree if they are qualified leads or not.” (Consultant B)

Clarifying the shared processes by defining the roles and used language is a prerequisite for generating leads in the right format. Without clear consensus between marketing and sales about what is a marketing qualified lead and sales qualified lead marketing cannot generate leads that are approved and followed by sales. The problem of sales blaming marketing of producing unqualified leads, resulting in sales ignoring them and marketing

blaming sales for poor follow-up leads both losing trust to each other, is also well documented in the research literature (Sabnis et al. 2013; Oliva 2006).

Sales Activities

The processes inside sales department might need some re-engineering after adapting to automation. Two of the six interviewed organizations had managed to develop their automation to a point where sales processes needed redefining. In other organizations, the stage of the adaptation was not yet in a point where it would have been meaningful to change any processes.

In organization L, the process for customer acquisition in the field sales team was re-shaped to focus on more high value customer, and a new structure of phone sales center was founded to serve customers who had already interacted with the inbound marketing content and were classified as “hot leads” and didn’t require any on-site meeting. The next step with organization L after this was to create a web shop, making the buying process for certain products easier. This redefining of the sales process, from always visiting customers on-site to closing some deals via phone and making it possible for customers to make the purchase without any interaction with a sales rep, was a great example of how MA supported this transition to create an easier buying process for customers and more efficient sales force utilization for the firm.

“So, since implementing and adapting to MA, the work of sales guys has changed completely, no more cold calls. They get so many leads in that they get all the meetings and all the deals from those inbound leads. There is however a dark side to this, since it makes the sales guy less selective. That means that the sales guy doesn’t do any selective picking on the potential customers, but just closes the incoming leads. So, whether it’s a really small low value customer or a really big high value customer, the sales guys just focus on the leads as they come, when they actually should focus on the high value customers more. So, the average value per deal decreases.” (In-house organization G)

“We had to create new processes for sales after getting the MA running, because of the incoming leads. In a short period of time, we have recruited several sales guys to do selling just by phone, and it works great. This has enabled our field sales guys to focus directly more on the high value customers.” (In-house organization L)

“Our B2B side has so big deals, that even one converted lead per year pays the system back. There is leads coming in, but not enough yet. They don’t have the sales process figured out yet, so they don’t want to yet go all in on that and drive traffic to their website.”
(In-house organization J)

Organization G had experienced a surge in generated leads since starting the adaptation to MA. It enabled them to refine their sales process by completely stopping formerly regular cold calls, and just focus on the leads coming through the automation system. The negative side of this was that it did not lead to optimal prioritization of the customers by their potential value. Instead of hiring new salespeople and changing the work processes of the current salespeople, Organization G saw new marketing technology, which enabled them to prioritize the incoming leads by their potential value, as an answer to their problem.

When inbound marketing principles are applied to drive more customers into engaging with the content a company is producing, and the company is expecting this to enhance its lead generation, customers that are ready to buy are also probably expecting companies to serve them quickly. If sales activities aren’t adapted accordingly, customers don’t get contacted fast enough, and it makes the company look bad.

Customer Knowledge Generation

Understanding the customer is at the center of a customer-centric organization. In order to create or redefine any service processes and create proper automation paths to customer relationships management, an organization must possess a clear picture of its customer base, its different segments and the varying buying processes of different products and organizations. In the B2B-side the real customer knowledge is with the sales representatives, since they are the ones interacting with customers most frequently.

“Many sales organizations have a good idea about the buying process of their customers in their own category. But what comes about silos, on both B2B and B2C sides marketing often do not have a clear understanding of what is the buying process of that category, since in many places its job has been to produce marketing campaigns that is measured by the amount of attention they get, which in many organizations has led to a situation

where marketing has actually no clue of what they are doing. So, they don't know what phase of the buying process or what segment they are trying to influence and why. If you don't understand how people buy, bringing automation to organization is just bringing in a spam tool.” (Consultant A)

“We have focused a lot on the overall company data, but if we are talking about MA, you can't really approach a company, you should approach different individuals inside the company ... another problem we have is that if we want to sell maintenance contracts to a customer, it's usually different person that has bought the machine than who is responsible of the maintenance contracts. And we don't have that information.” (In-house organization I)

“One way to segment our customers roughly is to divide them into two segments, fast buying – low value and slow buying – high value. Both have completely different buying process and information needs. And it needs to be integrated into automation and the website. We are trying to help fast buyers make their fast decisions. And on the slow side we are trying to get some attention and interest so that we can get there to do some physical sales.” (In-house organization L)

In-house organization I reported difficulties of obtaining customer knowledge due to their multi-actor distribution chain. Similar results were also reported from In-house organization J. The more people there is between the firm's own salespeople and the customer, the trickier it gets obtaining the customer information needed for comprehensive utilization of marketing automation. As a contrast, the B2C organization G could get the customer information necessary for automation development directly from their customer database. Nevertheless, when it came to B2B type sales of that organization, which was about recruiting new franchise entrepreneurs abroad, the most cost-efficient way for them to structure their B2B sales force was to buy it as an outsourced service, since they didn't possess necessary customer and market knowledge to train their own salespeople. From automation point-of-view, this kind of sales force outsourcing structure however posed challenges to sharing the customer information from those outsourced sales reps to the organization. The organization had not yet managed to create automation paths to that segment partly because of that.

Knowledge Dissemination

Once the customer knowledge is obtained, it still needs to be transferred to the right people in order to develop the communications to a more customer centric direction. The knowledge sharing can happen by interpersonal meetings or the usage of a CRM-system. The interpersonal meetings work great when more detailed information is needed and can be utilized coming in unstructured form, for example, when planning on new automation paths or when writing customer centric content. Interviewed organizations had placed processes for interpersonal information sharing. For example, Organization L had implemented a monthly meeting between salespeople and content creators, where they could share their insights.

The information put in the CRM-system or other database from where the information is fetched automatically by MA needs to be in a defined format. The interviewed organizations expressed their concern in the lack of CRM data quality, which was an obstacle for automation usage. Most of the companies struggled in getting the right kind of data to their CRM-system, which was often the responsibility of sales reps. Salmi (2017, 41-42) presents that even when using data to support manual marketing decision making, even without any automated paths, the data should be clearly defined and of good quality or the risk of making wrong decisions increases. As the speed and intensity of the usage of that data increases via MA, it's obvious that the information needs to be in a defined format.

“The manufacturing industry is extremely hard one. There the sales reps are used to handle the customers, and often don't even share the information properly on CRM system. There are many cases in Finland where there has been a sales rep in an import company with all the customer knowledge, and then he has left to company and the company has consequently went down. In Finland, especially this history with poor CRM information sharing poses bad starting points for MA.” (Consultant D)

“I'm trying to create a standardized and centralized process for data gathering. So, it definitely shouldn't be done by every business line themselves in their own silos, but it should be steered by the corporation.” (In-house organization J)

“The main reason for not getting “perfect” data to CRM system, isn’t because sales guys are afraid of sharing it, but because they think it’s consuming and irrelevant to use that kind of new technology. So, in our case, it’s about the ignorance of an individual, and also because other people are more fluent with new technological tools than other. ... In some places we have managed to build the information flow set up between sales and content production. In practice this has meant a monthly event where our people meet and can share information.” (In-house organization L)

Especially large organizations I and J expressed difficulties in creating the knowledge dissemination processes between sales and marketing needed to adapt to larger scale companywide automation. The human related aspect of salespeople’s lack of interest in using their time in filling the information to the CRM system was also present in most of the companies. Some people were more open to using their time in sharing the information, whereas others saw that it was too much of an effort on top of their everyday sales objectives.

Content Production and Distribution

Content production is about creating inbound marketing communications materials that help the customer in their purchase decision making journey. According to all the consultants and in-house organization experts, creating good content requires deep knowledge of customers, their problems and what is the firm’s stance on solving those problems with their products or services. A more recent marketing-sales interface literature also suggest that content marketing in general offers an opportunity to align sales and marketing closer together (Järvinen & Taiminen 2016; Wang et al. 2019). All organizations mentioned that content production requires a lot of work, but some organizations were more successful in it than others.

“If we talk about customer acquisition, one of the biggest realizations are that you need to talk to a specific group, you cannot use one material for everyone. Really simple. Usually when firms understand that they, for example, have three different buying personas, they also realize how big of a swamp it is and how little they have the required materials. They have the bottom of the funnel material, which represents 30% of everything they should have for customer acquisition at best.” (Consultant D)

“Content production poses most amount of challenges for us and we are still trying to find the best operating model for it. We haven’t yet gotten it run properly. But we actually just made a small organizational change where we believe we will fix it.” (In-house organization H)

“We have given thought to many of these things discussed, and we have internally asked that since we have certain responsibilities, the content should come from somewhere else. From product organization and other places, but they haven’t had resources to produce that information and materials.” (In-house organization I)

Creating impactful content required a lot of cross-functional work. The better the customer knowledge generation and dissemination processes of a company were, the easier it was to implement a content production process. But even though these processes would be in place, and the company would have the customer knowledge generation and knowledge sharing process fixed, resource scarcity and day-to-day responsibilities practically inhibit content production process. Only companies with clearly defined content production responsibilities were the ones that had managed to create a working content production process. Some companies had also decided to outsource parts of their content production.

Incentives and Rewards

If the concrete results of a project are to be realized somewhere in the future, companies might need to consider incentives in keeping their employees motivated on the target. Especially when a B2B company is starting to gather a standardized database of shared customer information, it requires quite a lot of extra effort from the salespeople who already feel pressure under sales targets.

“Sales reps job is to sell and he has sales targets, it doesn’t matter how much you try to explain to him that marketing automation will help him as well when we get it running by providing quality leads, they still struggle to see the big picture. ... We have problems with the data quality in our CRM system. We have incentives for every country organization to fix this, and they are embedded in their targets and it affects their bonuses. The only way to fix this in an organization as big as ours is to incentivize it properly.” (In-house organization I)

“We don’t have any incentives and I don’t have any budget to carry out these. And I also shouldn’t be the one telling them about incentives, it should come from the business lines themselves. This is really really heavy model and almost impossible. The corporation top management should put it on the list of prioritized things and incentivize it.” (In-house organization J)

Of the interviewed organizations only Organization I had implemented a clear monetary incentives program, not directly under marketing automation but in setting up their CRM data straight. Developing MA any further, a structured database of customer information is however a necessity. Depending on the situation, lining up objectives doesn’t however need to be done via monetary incentives as described by Fisher et al. (1997). Common metrics and goals that create transparency between the two functions can also have an incentivizing effect. Organization G reported that people in marketing became much more interested in tracking what happens to the leads that they generate to sales since it became transparent via marketing automation. According to the interviewed person, it positively affected marketers’ perspective on generating those leads since they knew that they were not wasted.

4.6 Training and hiring staff

After the vision, culture, structure and processes, it all comes down to the ones working with the new systems – people. Implementing and adapting to MA and developing a data-driven organization requires a set of new skills that can be acquired by training, hiring or outsourcing. All companies reported hiring a technical person for their technical development of marketing automation, or outsourcing parts of it.

“... we have quite a lot of brand marketing, awareness marketing etc. stuff at the top of the funnel, that marketing automation isn’t related to in any ways. And we should get to the point that the traditional branding person, when he makes a campaign, shouldn’t be satisfied to the number of individuals that saw or clicked the ad, which has previously been the objective. Instead the main objective should be for the individual to give his information and permission to receive marketing communications.” (In-house organization J)

“The job description of marketers’ changes, and the knowledge requirements change. It’s less about cutting the total amount of people, but the firm might need to change some people. Some may not be able to handle the new types of work. Often you might need some people with background in data-science, analytics, specialists for building the workflows and somebody who knows everything about customer insight.” (Consultant C)

All organizations reported a need to train their existing employees, and that it took more time than expected. Some people were also more adaptive to the new ways of working than others, which is in line with the previous research observation that organizations should hire open-minded marketing and sales staff (Rouzies et al. 2005). Learning and using a new technology that is used in day-to-day work takes time, and many employees needed to be encouraged into using it. Marketing automation adaptation wasn’t seen in any organization as a reason to cut off people, but the way that marketing people saw their job and goals needed reshaping as described by Organization J.

Organizations I and J reported that turnover of people in sales and/or marketing, especially the ones somehow responsible of the marketing automation adaptation, critically hindered the adaptation process. In smaller organizations this wasn’t an emerging theme. In the context of people many change management issues arose considering, for example, change resistance and power struggles. Tackling these aspects is critical for any project involving organizational change, but they are not to be analyzed further in this research.

4.7 Summary and reflections of the interviews

Table 8 summarizes and comprises the dimensions of the theoretical framework, under which critical success themes appear under which the pitfalls emerged from the data appear. Overall, customer understanding and a will to develop customer centric operations was seen as an absolute essential for successful large-scale automation adaptation and marketing-sales alignment. One of the main reasons for this is that in order to develop a resonating content and a solid content strategy, one needs to know the customers, their problems and their buying process well. Well-made content is the inbound stuff that creates the pull-effect, enabling marketing automation systems to gather data and act upon it. Another reason is that this information is also needed in order

to create a smooth purchase path for customers in digital channels. Small scale and easy to implement tactical use-cases of automation could be done without deeper understanding of the customer, such as abandoned shopping cart -communications, but these cases were perceived as nice benefits rather than the core purpose of the automation.

The adaptation to automation needs to get support from higher management. Especially in bigger organizations, the top management team buy-in itself isn't enough, it needs to be prioritized high. Creating a data-driven culture was a challenge to all but one organization. The outlier organization that didn't report challenges in creating data-driven culture was exceptional. The type of the business it was in and the type of customers it served required continuous data about their services, which kind of created an inner born data-driven culture to the organization.

Even though the transition from intuition to data-driven culture is a lot bigger topic than one just affecting marketing and sales, the stage of data-driven culture affects the easiness of automation adaptation directly and indirectly. The direct effect comes from marketing and salespeople willingness to engage in new work processes enabled by automation, whereas indirect ones comes from things like the top-management team's vision of the possibilities of data, which inevitably affect the quality of data and channels available for marketing automation to utilize. The people in charge of automation adaptation was also seen as an essential aspect, since it requires a lot of work to push it through. In few companies, the turnover of staff responsible of marketing automation was seen as a huge aspect slowing down the adaptation.

The extensity and maturity of adaptation to utilizing marketing automation varied a lot depending on the organization. Invariably, every organization was currently pushing it forward, had ongoing development initiatives and saw big possibilities ahead.

Marketing automation is just a vessel, requiring good quality data and organizational processes around it for it to start enhancing business performance. Some organizations battled with these two essentials and could not develop the automation forward before fixing them. Others had made organizational changes to sales and marketing before starting the automation, and others made the changes after they started to see results from the automation. In one organization the sales organization restructuring enabled the

dissemination of customer knowledge more efficiently, which had a direct effect on the content production essential to successful marketing automation. In two organizations the sales organizations needed restructuring as automation started generating quality leads on a fast pace for sales reps.

Table 8. Outcome of the research

VISION & DECISIONS						
DEVELOPMENT PRIORITIZATION		TOP MANAGEMENT TEAM			EXPECTATIONS MANAGMENT	
<ul style="list-style-type: none"> Arbitrary or technical prioritization Low prioritization from TMT 		<ul style="list-style-type: none"> Technical-tactic mindset Resources 			<ul style="list-style-type: none"> Megalomania 	
CULTURE						
DATA DRIVEN CULTURE						
<ul style="list-style-type: none"> Distrust Intuition based culture 						
STRUCTURE						
MARCOMMS STRUCTURE		INTEGRATOR			SALES STRUCTURE	
<ul style="list-style-type: none"> Traditional Marketing Department 		<ul style="list-style-type: none"> Integrating force 			<ul style="list-style-type: none"> Inefficient Sales Structure 	
PROCESS						
METRICS	CONTENT PRODUCTION	CUSTOMER KNOWLEDGE GENERATION	SALES ACTIVITIES	KNOWLEDGE DISSEMINATION	ROLES AND LANGUAGE	INCENTIVES AND REWARDS
<ul style="list-style-type: none"> Overanalyzed cause and effect Fuzzy cause and effect 	<ul style="list-style-type: none"> Product focused content Lack of content 	<ul style="list-style-type: none"> Customer abundance B2B buying process 	<ul style="list-style-type: none"> Underdeveloped lead management process Hot leads process 	<ul style="list-style-type: none"> Knowledge sharing CRM Knowledge sharing F2F Shared-process ambiguity 	<ul style="list-style-type: none"> Lack of communication alignment Role ambiguity 	<ul style="list-style-type: none"> Lack of incentives
PEOPLE						
TRAIN				HIRE		
<ul style="list-style-type: none"> Lack of training Lack of optimization 				<ul style="list-style-type: none"> Technical realities 		

As one interviewed senior manager responsible of marketing automation in her organization put it “*Marketing automation isn’t a technology, it’s a way of thinking*”. What she meant by this, is that marketing automation enables a framework to develop the organization into more customer centric one. This is realized by knowing the customer well enough, having the right channels to communicate with the customer and timing the communication right, which leads to the company being able to actually enhance the customer experience. Automated reactive workflows can manifest to customer as well thought, personalized, relevant and useful information just at the right time. Poorly done customer relationships management with the help of automation on the other hand labels the company as an ignorant spammer.

5 CONCLUSIONS AND DISCUSSION

The purpose of this research was to explore marketing automation adaptation and identify, categorize and analyze what non-technical themes companies need to consider when utilizing marketing automation to re-align their marketing-sales interface. An inductive qualitative interview study with open and semi-structured format and grounded theory approach to analysis was applied to survey this relatively new and unresearched context. The interviews were conducted amongst individuals belonging to two distinct groups with clearly different roles, the marketing consultants with extensive experience on consulting marketing automation implementation projects and the in-house organization experts responsible of the marketing automation adaptation in their organization.

Theoretical sampling was utilized in recruiting the interviewees, which enabled rich interview data. The marketing consultants provided especially good insight to challenges arising in the early phases of pre-implementation and implementation, whereas the in-house organization experts provided information about the latter adaptation phase. Analyzing the interviews, overall 26 pitfalls were discovered which could be then grouped under 16 critical success themes. These themes were then reflected against theoretical background of marketing and sales alignment and then grouped under the conceptual framework of this research, which was derived from the previous research of marketing-sales interface.

The results of the research clearly communicate the need to see marketing automation projects beyond the technological implementation. Most of the work comes from the non-technical themes affiliated with making the necessary organizational changes to reap the benefits from marketing automation system investment. These themes behind the successful alignment of marketing and sales utilizing marketing automation system are discussed next.

5.1 Discussion of findings

Utilizing automated information gathering and reactive automated communication patterns, productized as marketing automation (Vecchia & Peter 2018), to redefine and

align sales and marketing requires a lot of work, as described in the findings section. Utilizing marketing automation to align marketing and sales is about developing these two, and successful alignment requires re-thinking their scope, roles and responsibilities. Some of the parts making a successful marketing-sales alignment in the context of marketing automation are shared between marketing and sales, some of them are internal topics for these two functions and some come outside these two. This research didn't focus on all of the outside marketing-sales -factors such as issues rising in customer service and product management, that both also influence the overall customer experience.

The internal issue in the case of marketing department comes from the departments need to become more agile, data-driven and cross-functional with other departments. According to many interviewed persons, marketing departments have seemingly had low value in many B2B organizations, which has led them to become only support functions to sales. As marketing can claim a lead in the part of the purchase path that happens online, it must be ready to produce desired content and react to customer behavior that happens online.

Sales department on the other hand needs to be structured in a way that it can effectively handle generated leads. Ohiomah et al. (2019) present that the paths of how and why the use of IT systems affect sales performance is a narrowly researched field. The findings of this study, especially organizations G and L with most advanced automation adaptation, provide evidence that by utilizing marketing automation to re-define the sales funnel management, organizations can gain better sales efficiency by changing their sales processes or structure. In the case of organization G, the organization changed the process of acquiring new customers completely based on the leads that marketing generated and stopped cold calling. Organization L on the other hand created a whole new team of inside salespeople whose job was to handle the leads that could be handled remotely, which led to field sales team becoming more focused on high-value customers.

Marketing automation technology seems to enable marketing-sales interface alignment in many ways. One of those ways is that it provides a platform that fosters transparency between the two functions by making the sales funnel objectives visible and trackable for both parties. This obscurity in role and goal definition in sales funnel management has

been one of the biggest issues causing disputes between sales and marketing, as described by Kotler et al. (2006). Working towards shared goals is another factor that can bind marketing and sales more closely together. Marketing automation methods were applied use-case by use-case, which were about identifying a business problem where automation could enhance customer experience or operational experience. Some of these use cases did not consider both marketing and sales, but most of them seemed to do. Moving towards to solve these concrete business problems together can therefore help bring marketing and sales closer to each other, as they can increase the shared vision of how the marketing-sales interface operates and what is their role in contributing to business growth. Producing content and a good content strategy is the lifeblood of MA, and successful adaptation requires the organization to write content to specific customer groups. This information about customers is often in the sales department, so shared processes of how marketing can access this information need to be developed.

Whereas sales departments have always been driven by an undeniable performance metric of total sales, marketing departments contribution to the bottom line hasn't always been that clear. Creating digital content and channels that help customers in their decision-making processes and tracking the effect of the content by mutually defined sales qualified leads provides a set-up for a metric that makes marketing department undeniably relevant in creating sales. This metric is generated leads.

The biggest influencing force coming outside marketing and sales is the stance that higher management takes to the automation project. Previous research has identified this as well (Whittaker 1999; Cascio et al. 2010). According to the interviewees, approaching marketing automation project merely as a technical project is a certain road to failure. This issue of companies seeing projects in their marketing-sales interface involving technology merely as technical projects was already present in the early 2000's when many companies failed to meet their ROI targets of their CRM projects (Maklan & Knox 2009, 1403). The findings of this research support the idea that top management needs to see the project as an organizational development project and commit to it. As one consultant put it *"It's not easy to start talking about making a more customer centric organization especially in Finnish B2B firms, put it's easy to talk about a new technology project"*. A concrete project involving technology might make the concept of aligning marketing and sales for better customer experience a more easily approachable subject

than just talking about abstract concepts like listening the customer and making a customer-centric organization. But it also poses a risk of not taking the organizational development seriously enough, leading to bad investments in technology.

The question if marketing automation is the real reason that drives these described organizational changes remains unclear. Marketing automation probably acts as a catalyst or an enabler, depending on the organization. If one would take these insights and develop a company's marketing-sales interface with this knowledge, it would probably make an organization more customer-centric and enhance customer experience, even without ever implementing any marketing automation systems. Previous research into sales and marketing interface suggests that many of the problems, such as the lead management process (Sabnis et al. 2013), were latently there and should have been fixed a long time before marketing automation even was a thing.

Marketing automation researchers have previously compiled some rough frameworks based on previous research literature and content available online about the success themes of MA implementation (see Table 3). This literature however talks about marketing automation on an abstract level and does not provide information what is behind those success themes in practice and what kind of pitfalls companies face when utilizing marketing automation for sales and marketing alignment. For example, the content production theme mentioned in the Table 3 seem to pose many challenges in the marketing-sales interface, as new face-to-face information sharing processes need to be developed, and roles about who is responsible of what need to be decided, which might be time taken away from other old tasks, which then might require new work definitions. The pre-implementation to post-implementation breakdown and classification of different success factors of marketing automation project is also a little bit misleading, as the project seems to take many years and requires constant development, the adaptation works more like a spiral where things need to be adjusted constantly and by reacting to what works and what not.

Finally, this research approached marketing and sales as separate functions. The findings however strongly supported cross-functionality and shared processes of the two functions, which encourages to look the tasks of marketing and sales beyond functions and see both as serving the same fundamental goal of generating demand. The findings of this research,

constantly evolving marketing technology field and overlapping theories with information systems science should also encourage researchers in marketing and information systems science to tighten their co-operation in their research efforts concerning marketing technology.

5.2 Research quality and limitations

Qualitative methods and qualitative research are criticized for trustworthiness issues, especially because of their obscure trustworthiness assessment criteria (Eskola & Suoranta 1998, 151). Case study research especially faces critique on its findings not being generalizable (Gomm et al. 2000, 98). Lincoln & Guba (1985) present that for a qualitative research to be trustworthy, it must establish credibility, transferability, dependability and confirmability.

When talking about trustworthiness of a research, one way to assess it is by asking if there is enough research material and if the analysis is comprehensive enough (Eskola & Suoranta 1998, 155). In qualitative research the size of the research material, for example, the pool of interviewees, is hard to define. Therefore, a common principle for the size of the pool can be determined through saturation, which means that new interviewed persons do not bring any new information to the table (Eskola & Suoranta 1998, 44). In the first phase when interviewing consultants, a clear saturation point was reached after the fifth interviewed person. In the second phase interviewing the in-house organizations, a high-level saturation of critical themes was achieved, but since every organization differed from each other, with every organization there was also specific problems related to their automation development. Theoretical saturation is also one of the five elements of GT (O'Reilly et al. 2012).

Another way to increase trustworthiness is to make the research process transparent by describing the used methodological processes and practices in a detailed manner (Moisander & Valtonen 2006, 27). Lincoln and Guba (1985, 317-327) refer to this when talking about establishing dependability and confirmability, which in practice means presenting how the data was collected and how it was interpreted. In this research the chapters 3.4 and 3.5 are dedicated to explaining the research process open as well as

possible. The findings chapter also includes many direct citations from the interview data with the purpose of making the interpretations of the research more transparent.

Instead of talking about generalizability in the case of case studies, it is argued that case studies should be valued by their transferability, which means that the hypotheses generated can be transferred to other cases that pose similar features (Gomm et al. 98). Even though many shared themes among the interviewed persons were found, the interview pool was extremely heterogenic which poses limitations to transferability. Lincoln & Guba (1985, 316) however present that transferability can be established by thick description of the phenomenon and settings of the research in detail. The settings and phenomena of this research, and the background of interviewed persons was described in as much detail as possible without endangering the anonymity of the interviewed persons (e.g., see Figure 1 and Table 5). The next five points summarize the settings in which the research took place, and therefore need to be taken into consideration when talking about the transferability of this research.

Firstly, the research was split in two major groups, consultants and in-house organizations. Consultants tend to be experienced on the pre-implementation and the beginning of the implementation phases. Their job is also to sell their expertise, which means that without the in-house organization investing and committing to an automation system, the consultants don't have anything to sell. Keeping a consultant on the board for a long time is very expensive, which leads to in-house organizations only keeping the consultants as catalysts of the change. The consultants therefore don't benefit from the long-time implementation success of the adaptation, but more on the short-term one. The in-house organization on the other hand have to make it a permanent part of their businesses. The problems they face arise during the many years the adaptation process takes place.

Secondly, among the in-house organizations, the organization pool consisted of small and very large, B2B and B2C firms, from 1 to 4 years of adaptation to MA, and firms from very different industries. It is still worth mentioning that the two B2C companies also had B2B operations in their distributor/retailer/franchise customer relationships management, which enabled fitting the companies amongst the B2B ones. Even though this heterogeneity can be beneficial in terms of getting diverse information, the companies

with different backgrounds also face different kind of problems. As the duration and maturity of adaptation increases, companies also face different kinds of problems.

Thirdly, all the companies were based in Finland, and their marketing automation development yet only took place in the Finnish marketplace. Special characteristics of Finnish companies may affect the problems they face, limiting the global generalizability of the research. Some of the themes that arose in the interviews suggested that Finnish companies suffer from especially strong confrontation between marketing and sales functions. Another theme that was expressed by the interviewees is that generally Finnish companies love buying technology, thus increasing the previously mentioned uncertainty of what truly is the role of marketing automation in creating better alignment between sales and marketing. In a country or a company where technological investments are done with more meticulous understanding of the complete picture of what is required when adapting to a new technology, these companies may face fewer challenges.

Fourthly, an inductive, semi-structured research process comes always with a cost of the interviewees not answering to structured questions, which makes the interview data quite unstructured. The assumption was that the interviewed persons talked about the most relevant things hindering the adaptation. That assumption can however be biased, and the interviewed persons can talk about things that matter the most to them, not the most relevant things when talking about the big picture.

Fifthly, processual aspects are emphasized in the research material. This might be due to most of the issues arising in processes, but it might also tell about the perspective of the interviewed persons. Structural, cultural and vision related issues are the responsibility of higher-level management, whereas people related issues often belong to the departments of marketing and sales themselves. Therefore, especially the in-house experts responsible of the marketing automation are responsible of developing new processes.

It is also worth mentioning that even the most advanced company with almost 4 years of adaptation behind still considered that it had utilized only a small part of automation potential and was constantly searching for different application targets for it. The companies with highly developed automation adaptation might encounter challenges not found in this research.

Finally, it's important to acknowledge the other important links of successful marketing automation adaptation, which are the customer service and product functions. Since the scope of this research was the marketing-sales interface, they were left outside of the analysis even though they did appear in the interview data.

5.3 Scientific contribution

“Many of the most useful contributions come from real industry problems, rather than hunting around for an application area for some pet theory or technique. The problem should drive the approach—not the other way around.” Ronald Rust (Ladik & Stewart 2008, 160)

Research can contribute to science in the areas of theory, method and context (Brinberg & McGrath 1985; Ladik & Stewart 2008). Ladik and Stewart 2008 emphasize four important themes that affect behind the contribution. A researcher should clarify his target audience, argue the contribution in relative and absolute terms since contribution has a subjective nature, have passion toward the research topic, and lastly the results of a great research should cause a surprise effect (Ladik & Stewart 2008).

The biggest contribution of this research is in the area of context. Marketing automation as a context itself isn't a much-researched area, and the research in the context is mostly limited to tactical issues and do not provide deep insight about the organizational themes around it. Marketing-sales interface as a context is researched from many angles, but not extensively (Biemans et al. 2010). The research review of recent research history also reveals many different approaches into researching the alignment of these two, but only a couple of conceptual papers try to draw some outlines and approach the topic holistically. Considering the marketing-sales interface in the context of marketing automation when companies are facing an era of more self-active customers, and want to drive their marketing and sales to digital channels, it provides a great opportunity to research the re-defining of these two functions and their interface. This research is amongst the first ones to do research in this context and shed light on the individual pieces

that together affect the alignment of marketing and sales with marketing automation. The research therefore makes absolute and relative contribution in the area of context.

The methodological contribution of this research isn't as strong as the contextual one, but also worth mentioning. When researching an organizational change requiring project such as marketing automation, it's really hard to get even close to a complete picture of the phenomena, since a) during time employees change and b) during different phases of the project different kind of project experience is needed c) people tend to forget things as time goes on and different challenges arise. The methodological contribution therefore comes from the approach of dividing the research into two phases. The first phase was from the beginning of the project point-of-view, the consultants' perspective. The second phase was from the adaptation point-of-view, the in-house organizations perspective.

The small theoretical contribution comes from verifying that the older conceptual models of approaching the sales-marketing interface are still quite applicable and provide a good theoretical lens for reviewing the topic (see Rouzies 2005; Hughes et al. 2012). This research also updates the framework of Rouzies (2005) to 2019 by adding sub-level categories like the content production approach and main level theme of TMT vision and managerial decisions to the original framework.

An overall framework approach, instead of reviewing one aspect of it as many of the past researchers have done, was selected because the target audience of this research is top management team members and managers that are currently considering making an investment on marketing automation system, or have made the investment but are failing to see proper return on investment. The framework of table 8 is compiled to help leaders understand the requirements of successful MA adaption from the marketing-sales alignment point-of-view, which hopefully helps them consider at what point is a reasonable time to start developing and purchase a marketing automation system.

The most surprising element that emerged from the interview data was the lack of management support and understanding towards marketing automation in many organizations, despite it being a critical success aspect for the project. This finding may support the previous research literature talking about the diminished strategic voice of marketing in the C-suite, that leads to top management not paying too much attention in

what is happening with marketing (e.g. Whitley & Morgan 2017). Another unexpected thing was that the one organization that didn't do traditional marketing communications in the past was actually the most advanced one in re-engineering its marketing-sales interface with the help of an automation system. In this organizations the new established marketing department however wasn't named as marketing department, but demand generation department.

5.4 Managerial implications

This research provides extensive insight into the organizational context that needs to be taken into consideration when planning on making an investment on a marketing automation system. Even though a comprehensive approach into adapting to marketing automation requires more than just addressing the marketing-sales interface, this interface alone requires many themes to be considered. Vision, culture, structure, process and people are all parts that mediate the effect of each other, and therefore missing pieces might have a huge influence on the overall success of the adaptation. When creating market-based capabilities through developing the marketing-sales interface, organizations also needs to address how this interface plays with other functions of the firm, such as HR, R&D and Accounting, as presented in the research of Hughes et al. (2012). Insights into how marketing-sales interface works with other functions of the firm were also present in the interviews, but were not discussed due to the focus of this research being on the marketing-sales interface itself.

The framework with examples of pitfalls presented in this research provide a toolkit for managers to better understand and articulate the aspects to be taken into consideration when trying to get a properly scoped buy-in to the project from top-management. It also works other way around, providing a more realistic picture of the possible scale of the adaptation to the top management team, which can help them in making well informed resource allocation prioritization decisions. As presented in the chapter 4.2, a common pitfall is to label the marketing automation project as a technical one, which can lead to undersized resource allocations, prioritizing technical development over business thinking and eventually low ROI outcome that does not come near the initial expectations.

Customer centric structures and processes, described in chapters 4.4 and 4.5, can be developed before bringing the automation in. For example, organization K restructured its sales department for better customer information generation and dissemination before starting the automation project. The content production approach can also be applied without automation, as it is just about understanding customers and producing content addressing their problems. Management teams are therefore challenged to ponder is it more wise to develop these aspects before making the investment and starting to pay annual fees for marketing automation or do they want to bring the automation in to an unfinished organization to act as a catalyst of change.

5.5 Future research opportunities

This research leaves a fruitful ground for future research. It provides evidence that marketing automation is an emerging concept where companies face many challenges. It also presents that marketing automation is a part of larger data and automation scene that is growing constantly. The researcher encourages future marketing automation researchers to see beyond the productized “marketing automation” -term and acknowledge that especially firms developing IoT products and services possess communication channels that could be used as a channel for marketing automation.

In the context of customer relationships management, a potential research perspective would be to study how developing marketing automation can pose risks to customer relationships. For example, how does the shift to a more digital and automated sales funnel affect the purchasing behavior of customers that are not too comfortable in the digital world. Or if the digital cross-selling efforts to existing customers actually provide better input-output ratio than by real-human salespeople contacts to every customer segment.

Research opportunities in the context of marketing automation also span beyond just customer relationships management in the sales-marketing interface. When developing customer experience, the role of other functions also needs to be addressed, not just the role of sales and marketing. When talking about customer knowledge generation, dissemination and content production, other functions such as customer service and

product management might provide insights to customer behavior and industry trends that salespeople do not possess.

Lastly, a more structured approach for future research is recommended. As presented throughout the research, the term of marketing automation isn't well defined and there is no clear consensus of it. Organizations selling the technology see it one way, organizations consulting the adaptation see it one way and the in-house organizations living with it see it one way. Therefore, the researcher encourages smaller parts in the context of marketing automation, like customer knowledge generation, to be researched. The framework provided in this research enable future researchers to better understand and address those smaller parts. Researching specific industries where companies own potential communication channels through their products, such as IoT companies, and pioneer companies with well-developed strategies for marketing automation utilization are encouraged to be researched for cutting edge insights into the topic.

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APPENDIXES

APPENDIX 1: Semi-structured interview template

1. Strategic argumentation and justification

How did you manage to get TMT interested and support MA implementation process?

How has the support been throughout the adaptation?

What kind of problems arise?

2. Re-organizing the marketing/sales/customer service functions

What kind of transformations MA adoption has required in your marketing/sales/customer service organizations?

What kind of problems arise?

3. Creating business cases

How do you analyze your business when deciding where to utilize MA?

What kind of problems arise?

4. Internal metrics

What are the most important metrics you use in sales/marketing/customer service?

How has marketing automation affected those?

What kind of problems arise?

5. Managing the shared processes of departments included in sales funnel

How the roles and processes of marketing/sales/customer service have changed during MA adoption?

What kind of problems arise?

6. Customer knowledge

How well do you know your customers and their buying process and how do you utilize this information in MA?

What kind of problems arise?

7. Content Production

How have you organized content production in your company?

What kind of problems arise?

APPENDIX 2: Preliminary pitfall matrix compiled from consultants' interviews

Critical success factor	Pitfall	Bridging the pitfall
Strategic emphasis	<i>TMT not involved</i>	Communicate the strategic objective for organizational change clearly to win TMT support.
	<i>Technical-tactic mindset</i>	Create a vision of how the technology is used from the whole organization point-of-view, and how it should affect the business on a 3-5-year perspective.
Internal metrics	<i>Fuzzy cause and effect</i>	Sales are concerned with short-term metrics as marketing is more focused on long-term metrics. Align marketing and sales metrics to create a shared vision of what is being pursued. Start with one shared metric.
Marketing-sales configuration	<i>Role and process ambiguity</i>	Create a shared understanding of how leads are defined and who handles them at what point. Open the current lead generation logic and define together MQL and SQL.
	<i>Distrust</i>	Cultivate transparency and create transparent processes in customer relationships management.
Customer understanding	<i>Customer abundance</i>	Create customer profiles of whose experience you want to understand. Start with the most important and biggest potential customers. Link the understanding with case prioritization.
	<i>B2B buying process</i>	Customer abundance and obscure B2B buying process can be an overwhelming entirety. Extract the customer understanding your organization has and test & learn. Utilize technology for aggregated organizational interest.
Case prioritization	<i>Arbitrary or technical prioritization</i>	Analyze your business processes to recognize is the most you can gain in customer acquisition, nurturing or retention.
	<i>Megalomania</i>	Adapting marketing automation is a long process but trying to bite more you can chew at one bite can be dangerous. Generate quick and concrete wins to maintain good spirit as you proceed.
Organizing the marketing function	<i>Lack of optimization</i>	Train or hire analytical marketers to craft hypotheses to be tested.
	<i>Technical realities</i>	Hire technical experts for managing the technical infrastructure but align them close with marketing.
	<i>Friction</i>	Re-engineer marketing processes to keep up with the speed. Aim for an agile function. Marketing should love numbers and drive quantifiable results.
Content production	<i>Lack of content</i>	Create a well-managed process for content production. Outsource some parts of content production if necessary.
	<i>Product focused content</i>	Create content for different customers with different problems at the different stages of the customer lifecycle. Speak to different levels with their own language.
Change management leadership	<i>Change resistance</i>	Involve all the parties that the change affects, that usually being salespeople, marketing people and customer service people to workshops right from the beginning and throughout the change. Cultivate internal ambassadors. Re-allocate efficiencies gained.
	<i>Power struggles</i>	Harness cross-functional teams and problem solving to fade traditional departmental power structures.
	<i>Outdated culture</i>	Marketing automation is about taking a huge step from intuition-based decision making to evidence-based decision making. Support and communicate this cultural change consistently.