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MARKETING | REVIEW ARTICLE

Silver bullet or millstone? A review of success factors for implementation of marketing automation

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Abstract: With a current market size of more than $11 billion, expected to double within 5 years, more businesses are expected to acquire, implement, and update marketing automation systems in the near future. However, for all the promises of profit and organisational revolution, there is already a gap between those who successfully implement and use marketing automation and those who don't. This paper reviews the small body of literature and publicly available research and reports to determine the key antecedents of marketing automation success. There are seven common factors that businesses should consider and follow pre, during, and post-marketing automation implementation. These include; the availability of the correct human resources and expertise, reviewing and implementing new business processes, correctly scoping the implementation project, gaining organisational buy-in, creating customer-centric content, continuing investment, and the setting of realistic expectations.

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PUBLIC INTEREST STATEMENT

It is expected that by 2023 businesses will spend $25 billion on marketing automation platforms worldwide. This investment means that managers are under more pressure than ever before to prove a return on investment for their marketing software spending. In this study, available research is reviewed to find what drives a successful marketing automation implementation and how businesses can continue to use their system effectively. The review found that there are seven common factors which businesses should consider and follow pre, during, and post-marketing automation implementation. These include; the availability of the correct human resources and expertise, reviewing and implementing new business processes, correctly scoping the implementation project, gaining organisational buy-in, creating customer-centric content, continuing investment, and setting realistic expectations.

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1. Introduction

In April (1960), G.W.Head, Manager of Advertising and Sales Promotion for The National Cash Register Company, posed a series question to the readers of the *Journal of Marketing*.

"What does office automation mean to the marketing man? What benefits does it offer? How can automation improve the scientific techniques of marketing management?"

Almost 60 years later, academics and marketing practitioners—of all genders—are still asking these same questions. And while we've come a long way from the "marketing automation" of the 1960s such as vending machines, electronic data processing, and automatic warehousing (Goeldner, 1962), companies continue to invest in platforms to automate marketing processes (Tonkova, 2016). Among the almost 7000 marketing technology solutions currently available (Brinker, 2018), marketing automation is becoming an essential component of any business's technology stack.

Despite a reported investment worldwide of $11.4 billion in 2017 (Sweeney, 2018), there are relatively few academic studies available about marketing automation platforms. Definitions vary greatly across these few studies (Benz & Tanner, 2017) from the company-centric automation of repetitive tasks to find efficiencies (Doyle, 2000; Ekdahl, 2018; Jena & Panda, 2017; Świeczak, 2013), to the customer-centric delivery of content to users based on specific rules (Järvinen & Taiminen, 2016).

Unsurprisingly, the reported benefits of implementing a marketing automation platform also differ. From the generic generation of higher revenues (Jena & Panda, 2017), to the precise measurement of marketing strategies and their effectiveness (Redding, 2015; Świeczak, 2013), increased alignment between sales and marketing (Redding, 2015; Sandell, 2016) and cost-saving through the reduction in the size of marketing teams (Doyle, 2000). Interestingly, few—if any—definitions include the undoubtedly automated but more advanced features of personalisation, segmentation, and analytics available through marketing automation platforms, particularly in the fields of artificial intelligence (AI).

Indeed, just as definitions and benefits differ, so do reported results and the reasons for both failures and successes. Through a review of existing literature and publicly available information, this review will identify key indicators of what separates organisation who successfully implement marketing automation from those who don't. The review will also provide a framework for businesses considering investing in marketing automation technology, including three key stages to a successful implementation, three drivers of post-implementation success, and best-practice advice for human resource management.

2. Marketing automation research overview

Marketing automation is an increasingly crucial topic for marketing managers and practitioners, with an anticipated doubling of investment to $25 billion by 2023 (Sweeney, 2018). Currently, 292 platforms (Brinker, 2018) service more than 2.5 million websites worldwide (Built With, 2018). This market size has grown from only 10 platforms in 2011 (Brinker, 2018), with software giants Oracle, Adobe, Salesforce, and IBM, recently joining marketing automation specialists Marketo and Infusionsoft through the acquisition of existing platforms or developing their own marketing automation products.

Relative to, and perhaps because of, this recent explosion, academic research into marketing automation is limited. However, while the domain of marketing automation research is still in its infancy, it is possible to extend knowledge through lessons, research, and best practice from complimentary digital marketing disciplines and associated software including; CRM, sales-automation tools, email marketing, SMS marketing, online testing and optimisation, content marketing, and web personalisation.

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Unlike peer-reviewed publications, there are no shortages of use cases, testimonials, surveys, and research surrounding marketing automation available from and commissioned by vendors and agencies. Numerous and rich in data, these reports also provide interesting insights for this paper. However, the nature of these reports is—generally—as a sales tool and may include inherent biases.

2.1. Is marketing automation successful?

With so much investment from the world's biggest brands and brightest marketing minds, the inevitable question for all considering marketing automation is; does it work? As technology improves, costs reduce, and marketing automation becomes available to organisations of almost every size and budget, this question needs answering more now than ever. Unlike a number of studies at the turn of the century highlighting a number of failures in the adoption of sales force automation technologies (for example, Jones, Sundaram, & Chin, 2002; Speier & Venkatesh, 2002), marketing automation studies have so far been mostly positive (for example, Doyle, 2000; Järvinen & Taiminen, 2016; Redding, 2015; Sandell, 2016; Wang, Malthouse, Calder, & Uzunoglu, 2017).

One of the earliest examples of this optimism can be seen in Doyle's (2000) think piece about emerging marketing automation solutions. Foreseeing the benefits of both email and SMS as a marketing communication tool, while warning of organisation implications, he could see a 100-fold increase in the volume of communications sent to clients. Similarly, Redding (2015) with the caveat of success dependent on proper implementation, saw marketing automation as providing the glue to align sales and marketing and building a customer-focused business.

This improvement in sales and marketing functions has been the major focus of studies to date. Identified benefits have included generating higher quality sales prospects (Järvinen & Taiminen, 2016; Sandell, 2016), in larger numbers (Järvinen & Taiminen, 2016; Wang et al., 2017), with more information about and stronger relationships with leads (Sandell, 2016), through sales and marketing efficiencies, transparency, and strategy (Järvinen & Taiminen, 2016).

Publicly available research from private firms has - ironically given this research is mostly used as a sales tool - been less glowing but is, for the most part, is still positive towards the technology. Interestingly, while efficiency, transparency, and analytics—and return on investment in particular —is a driving reason for many businesses to adopt marketing automation, Higher Logic (2018) reports that 18.5% of survey respondents never use dashboards for reporting. With close to one in five businesses not measuring their activities, self-reporting of success may be unreliable (Marquis, Marquis, & Polich, 1986), and the aforementioned academic case studies more useful (Järvinen & Taiminen, 2016).

Econsultancy's annual Email Marketing Industry Census reports what while email marketing is seen as the most effective marketing channel in terms of return on investment (Gilliland, 2018), 33% of respondents considered their automated email marketing program to not be successful (Moth, 2017). Similarly, the marketing automation vendor Act-On (2016), reported that 15% of respondents in their State of *B2B Marketing Automation* report rated their marketing automation activities as ineffective, with 85% rating them as effective. LeadMD also reported that half of the 2061 companies benchmarked in their 2016 report had seen no increase in qualified leads since implementing marketing automation.

3. Antecedents of marketing automation success

Regardless of the report or study, it is clear that marketing automation is far from the silver bullet many marketing vendors promise and many businesses expect. However, available literature does provide best-practice, insightful case studies, and research that highlights the

differences between those who are successful in their marketing automation, and those who aren't. Seven key antecedents of marketing automation success have been identified through a review of this research (Figure 1); with three pre-implementation, three post-implementation, and one spanning both.

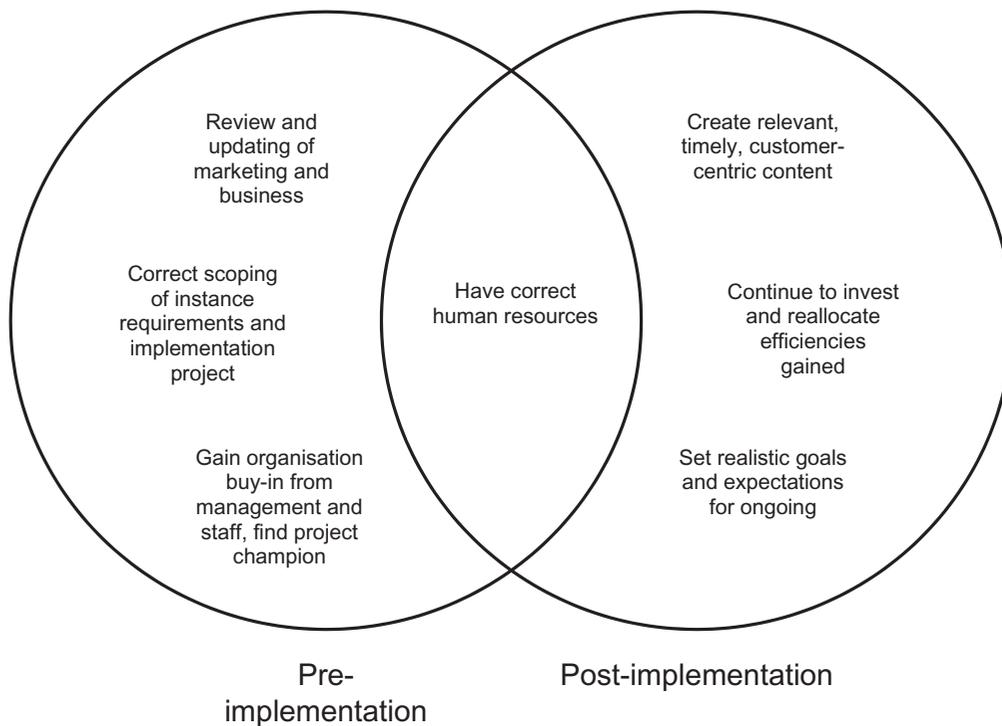### 3.1. Pre-implementation steps to success

3.1.1. Step 1—Review and development of internal marketing and business processes

Perhaps best summed up by Benz and Tanner (2017) "anecdotal evidence suggests that executives possess an irrational belief that a technical solution will fix decades of lax processes and procedures," marketing automation software in and of itself cannot magically make marketing better or fix broken processes (Wood, 2015). This can also be seen across other software implementation, where projects have failed due to too much attention being placed on technology, rather than business, management, and organizational issues (Luftman, Lewis, & Oldach, 1993).

Instead, when considering a marketing automation solution, businesses need to assess how their current marketing processes are managed (Doyle, 2000; Wood, 2015) and understand the strategic, technological, and human resource requirements of automation (Xu, Yen, Lin, & Chou, 2002). In a survey of 478 Chief Marketing Officers by The Economist (2015), 81% of respondents identified the need to restructure their marketing departments to meet these needs of modern marketing.

The results of this review of marketing and business processes will almost always require changes to internal processes (Xu et al., 2002), with implications for people, processes, and technology (Doyle, 2000), often beyond just the marketing automation platform itself. Indeed, Brinker and colleagues (2018) suggest that governance is the most important part of a marketing operating model, and it has been shown that done correctly, a competitive advantage can be gained by businesses that have understood the opportunity provided by

Figure 1. The seven antecedents of marketing automation success.

Pre-implementation
Post-implementation

Review and updating of marketing and business

Correct scoping of instance requirements and implementation project

Gain organisation buy-in from management and staff, find project champion

Have correct human resources

Create relevant, timely, customer-centric content

Continue to invest and reallocate efficiencies gained

Set realistic goals and expectations for ongoing

the business process change of implementing new systems (Luftman et al., 1993; Redding, 2015; Wood, 2015).

3.1.2. Step 2—Conduct proper scoping

With business processes and strategies in place, the next step in implementing a marketing automation instance is initiating scoping to assess costs, functionality, and the implementation process (Jena & Panda, 2017). However, a significant subset of companies attempting marketing automation miss this important step (Benz & Tanner, 2017).

The establishment of clear software requirements and specifications, objective and goals, and a realistic schedule are the three top critical factors for the success of a software project (Nasir & Sahibuddin, 2011). And while a well-scoped project can have a positive impact on an organisation's performance (Gunasekaran, Love, Rahimi, & Miele, 2001), a project with poor cost and risk estimates and weak definitions may fail (Whittaker, 1999), and even hinder and restrict an organisation's performance (Gunasekaran et al., 2001). With often many internal stakeholders and existing systems influencing decisions made, companies should focus initially on developing governance structures to guide the scoping, evaluation, and selection of a marketing automation platform (Binker and Heller, 2015) before beginning the process itself.

3.1.3. Step 3—Gain organisational buy-in and find a project champion

The pre and post-implementation success of a marketing automation platform relies greatly on the buy-in of internal management and staff. A lack of top management involvement and support for a project negatively affects software projects (Whittaker, 1999). However, by securing management buy-in, often through a strong business case and realistic project plan developed in the scoping phase, and through alignment with committed and motivated supervisors and staff, the probability of implementation success increases (Cascio, Mariadoss, & Mouri, 2010; Gheni, Jusoh, Jabar, & Ali, 2017; Gunasekaran et al., 2001; Whittaker, 1999). Top-level management support is also crucial to obtaining sufficient budget and resources for an implementation project (Lin et al., 2018)

Project leaders have been shown to be extremely influential in the success of projects (Lin et al., 2018). During the implementation phase, the identification of a project champion with charisma is positively associated with increased performance (Shao, Feng, & Wang, 2017) effort expectancy, social influence and facilitating condition perceptions of users (Neufeld, Dong, Higgins, 2007). It is recommended that in order to achieve maximum benefit from an implementation, organisations should invest in developing the leadership skills of supervisors and project champions (Rezvani, Dong, & Khosravi, 2017)

While management buy-in and alignment with supervising staff is essential and can flow through the business (Cascio et al., 2010; Obal & Morgan, 2018), the adoption of new software by staff is also important. In a longitudinal study, Jones and colleagues (2002) identified that the attitude of sales staff towards a technology impacts on their intention to use a system, findings which have also been shown in the acceptance of other enterprise software within organisations (Hassandoust, Techatassanasoontorn, & Tan, 2016; Sorgenfrei, Ebner, Smolnik, & Jennex, 2014). Here, education about the benefits of the system and training in its use can be vital to ensure the ongoing success of any marketing automation system.

3.2. Post-implementation antecedents of success

3.2.1. Create and deliver relevant and timely content

At its heart, marketing automation is a communication and engagement platform that requires content to be delivered to an audience. Two studies demonstrated that when done well, content increases high-quality leads and won opportunities (Järvinen & Taiminen, 2016; Wang et al., 2017). Wang et al. (2017) demonstrated that online content and digital events such as webinars delivered via a marketing automation tool are more effective in creating won opportunities than more traditional in-person sales events.

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In a similar study of successful marketing automation and content delivery, Järvinen and Taiminen (2016) highlighted the approach of a firm that acquired a marketing automation platform to target customers "with the right content at the right time." By creating and delivering compelling, relevant, and valuable content based on individual customer needs, the firm increased their number of high-quality leads (Järvinen & Taiminen, 2016). Positive results have also been seen in the personalisation of email content and reduction of company-specific messaging (Sahni, Wheeler, & Chintagunta, 2018). In contrast, customers can be turned away by heavy-handed, time-wasting promotion that is devoid of content that the reader finds useful.

A data-driven, best-practice approach of solving customer problems rather than promoting company products (Järvinen & Taiminen, 2016; Westergaard, 2016) is often overlooked and/or misunderstood by businesses. Best-practice content approaches can include asking customers and prospects for feedback of what they are interested in learning (Ghanadan, 2018), and using analytics to gain a deeper understanding of which content is being consumed by an audience (Heddleston, 2018).

When relevant and timely content is not immediately implemented, it can set a business back years in their engagement with prospective and current customers. This learning curve has been self-reported by business, with only 27% of those new to marketing automation reporting they are sending more relevant messages, compared to 74% of businesses who have been using the technology for more than 2 years (B2Bmarketing.net and Circle Research, 2015).

3.2.2. Set realistic expectations and be patient

With an average tenure of only 42 months—the shortest of all executive level c-suite positions—Chief Marketing Officers are under extreme pressure to demonstrate the success of any new marketing initiatives (Vranica, 2017). And while there are demonstrable examples of marketing automation success, it seems that managers of all levels have unrealistic expectations of how revolutionary an implementation will be.

According to Ascend2 (2016), nearly two-thirds of survey respondents expect to realise the benefits of their marketing automation system within 6 months of implementation. However, with only 8% of businesses seeing increased revenues within this time (B2Bmarketing.net, & Circle Research, 2015), there will be disappointment for those firms without realistic expectations of success. Waiting an extra 6 months can show a dramatic increase in firms reporting increased revenue to 32% (B2Bmarketing.net, & Circle Research, 2015).

Rather than set unrealistic expectations of revolutionary growth, Biegel (2009), recommends managers demonstrate a series of "quick wins" aligned with implementation plans that can then help build the case for further investment. Binker and Heller (2015) also suggest that a "thoughtful program of experimentation" can also help an organisation become more innovative and yield positive results. Overall, managers must understand that reaping the benefits of marketing automation efforts requires time and monetary investment (Järvinen & Taiminen, 2016). Patience is necessary.

3.2.3. Continue to invest and reallocate found efficiencies

With organisational efficiency a driver for investing in a marketing automation platform (Doyle, 2000), it is inevitable that successful implementation will result in the replacement of human individuals with marketing function automation (Järvinen & Taiminen, 2016). For marketing managers, this should be seen as an opportunity to further invest in marketing automation through staff resource reallocation (see next section for further details), rather than simply cutting expenses.

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However, as a business matures with its use of marketing automation and begins to use more resource intensive and advanced features, firms should continue to invest were the cost-benefit is appropriate (Jena & Panda, 2017). This may include additional human resources, system functionality, additions to technology stack, or supporting marketing and advertising initiatives.

3.3. Human resources and expertise at all stages of marketing automation

Automation cannot and never will take the place of intelligence, well-trained personnel, effective advertising, carefully planned promotions, sound policies, and satisfying customers' needs (Benz & Tanner, 2017). These are all elements that require human oversight and cannot, for the most part, be optimally automated. Not only does marketing automation require this human oversight to "drive" a system through strategy and direction, it also requires developers, content creators, analysts, marketing automation specialists, or individuals with some or all of these skills to correctly implement and run.

A lack of human resources with the correct expertise can hamper an implementation before marketing has even begun. Access to skilled personnel is a challenge in software projects large and small, with other challenges usually due to human factors such as competence and collaboration (Mohagheghi & Jørgensen, 2017). Highlighting the importance of having the correct staff pre and during implementation, as well as once the marketing automation instance in place.

3.3.1. Building and maintaining internal capabilities

Firms undertaking a marketing automation implementation may require additional resources or specialized skills training for existing staff. Managers can facilitate the learning and development of their staff by offering training and leadership that encourages staff to learn through experiments and trial and error (Järvinen & Taiminen, 2016). The promotion of collaboration between marketers and subject specialists in this learning environment can also assist in the creation of high-quality and customer-centric content (Järvinen & Taiminen, 2016). If new staff are required, managers should ensure that they come with existing skills and knowledge to add to and compliment the current workforce and have an understanding of the characteristics of marketing automation and digital marketing (Järvinen & Taiminen, 2016).

3.3.2. Utilising external expertise and resources

For many businesses, training existing staff can be a challenge when introducing a marketing automation platform (Jena & Panda, 2017). The configuration of an instance may also pose a challenge (Jena & Panda, 2017), and the adoption of marketing automation also requires expertise in IT and data analytics tools, which are not always available internally (Järvinen & Taiminen, 2016).

To fill these knowledge gaps and cut learning curves, businesses should consider outsourcing some or all of their marketing automation implementation and maintenance. This is particularly encouraged where it is not financially or logistically possible to hire or train internal staff. Outsourcing has proven to be the norm rather than the exception when it comes to marketing automation strategy, with 63% of companies outsourcing all or part of marketing automation strategy planning (Ascend2, 2016). Interestingly, the value of this outsourcing is demonstrated by three-quarters of "very successful" marketing automation users outsourcing all or part of their marketing automation strategy (Marketo and Ascend2, 2015).

4. Conclusion

Like all tools, while marketing automation can provide many organisational benefits, if not used correctly, it can be quickly abandoned—or worse become a burden. It is important that all businesses considering marketing automation understand that it is not a quick solution, cannot fix marketing and organisational processes, and will have challenges to overcome (Wood, 2015). But by instituting proper processes, correctly scoping needs and objectives, and gaining internal support all with the help of the right people the chances of effectively implementing marketing automation is greatly improved. Investing in people and technology, creating relevant customer-centric content, and being

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patient will also help businesses to leverage their implemented technology to increase the probability of ongoing success, and ultimately, increased engagement and profits.

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