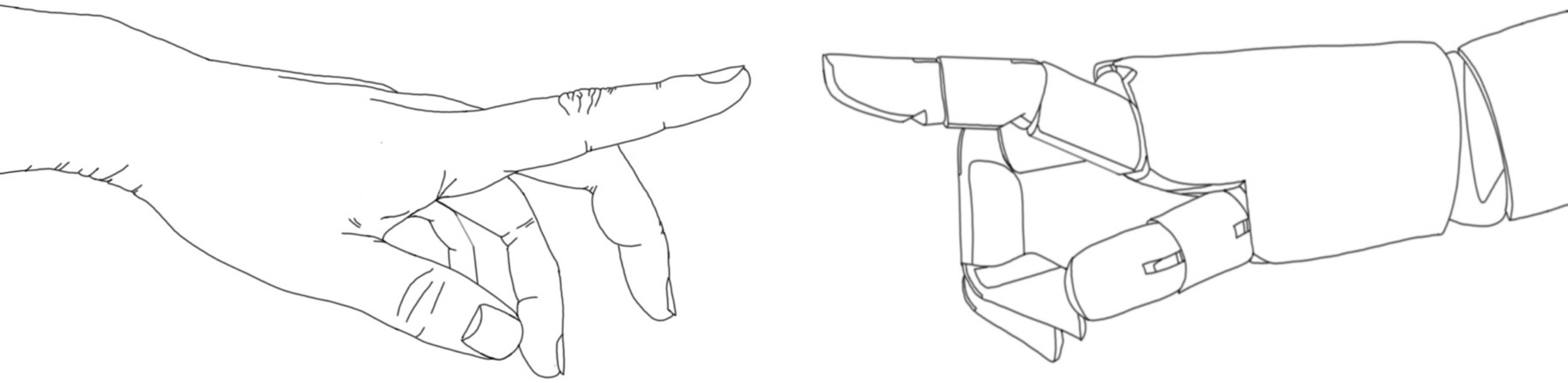

Exploring the role of marketing automation in fostering online engagement in business-to-business settings

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Declaration and copyright

This thesis is the result of the author's original research. It has been composed by the author and has not been previously submitted for examination which has led to the award of a degree.

Signed:

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Parts of this thesis have been presented and published in various Academic events during the development of the research (2018 – 2023).

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Looking back on this journey, it is easy to note how not everything unfolded as they were planned. Yet perhaps it is these deviations from the plan that make me even prouder to have reached this point. I am immensely grateful for this experience, and for all the valuable lessons and knowledge that I have accumulated along the way.

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Abstract

Digitalisation and advancements in technologies, such as artificial intelligence (AI) and automation, have created new opportunities for understanding buyer-seller interactions in complex business-to-business (B2B) customer journeys. This thesis contributes to this understanding, by exploring the role of marketing automation in influencing online engagement behaviours across such journeys. For this thesis, 29 semi-structured interviews were carried out with experienced digital marketers working in-house in B2B organisations (n=14) and digital marketing agencies (n=15). Participants were selected based on their expertise with marketing automation and B2B content marketing and they were based in two countries, Finland and the UK.

The findings of this thesis reveal how online manifestations of engagement are journey-dependent, and thus engagement manifests differently in different phases of the B2B customer journey. Moreover, marketing automation can be used to both capture and facilitate these instances across the journey. Additionally, the findings demonstrate how prospects are engaging with the selling organisation before purchase, and even before humans (e.g., marketers or salespeople) are involved. This is of interest, as a large portion of extant academic research has considered engagement as a post-purchase endeavour (e.g. Lemon & Verhoef, 2016; Pansari & Kumar, 2017). Thus, the findings of the study extend our understanding of B2B engagement by considering engagement behaviours that occur prior to the first purchase, as well as the potential of non-human actors (Storbacka *et al.*, 2016) in fostering such engagement.

Furthermore, this thesis contributes to engagement marketing literature by developing our understanding of automation-enhanced online engagement marketing efforts. The findings demonstrate how marketing automation enables the personalisation of interactions at a scale, enabling the creation and management of more outbound engagement opportunities between organisations and their audiences. Moreover, the abilities of marketing automation to measure online engagement behaviours and factors that facilitate the success of such initiatives are addressed.

Table of Contents

List of Figures

List of Tables

1. Introduction

1.1. Chapter introduction

In the business-to-business (B2B) sector, recent advancements in digitalisation provide notable opportunities for organisations looking for new ways to foster relationships with their audiences. In particular, technologies such as artificial intelligence (AI) and automation offer new possibilities for managing customer interactions in digital environments (Rustholkarhu *et al.*, 2022). Nevertheless, our current knowledge of the impact of digitalisation and emerging technologies on B2B relationships is incomplete (Hofacker *et al.*, 2019).

This thesis aims to contribute to this understanding by providing valuable insights into the role of emerging marketing technologies in nurturing B2B relationships. Specifically, the focus of this research revolves around exploring the potential of a specific digital marketing tool: marketing automation. By examining the potential of marketing automation in driving online engagement across B2B customer journeys, this thesis seeks to contribute to our theoretical understanding of online engagement behaviours in automation-enhanced environments, as well as provide valuable insights to marketers on ways to utilise the tool for engagement marketing.

This chapter is structured as follows. First, the research background is discussed, after which the research problem and rationale, including the research aims and objectives, are described. This is followed by an outline of the research approach after which an overview of the thesis, outlining the forthcoming chapters, is presented. The chapter then concludes with a chapter summary.

1.2. Background to research

The B2B sector has been described as the next frontier for digitalisation (Hofacker *et al.*, 2019), driving significant changes in the overall marketing landscape. Notably, customer-company interactions have become increasingly computer-mediated (Obal & Lancioni, 2013; Pagani & Pardo, 2017) and thus more dependent on technology, reflecting the growing importance of digital platforms and tools in facilitating B2B interactions. For example, recent projections indicate that by 2025, 80% of B2B sales interactions will take place digitally (Gupta, 2022). Considering these developments, it becomes crucial to explore effective ways to devise strategies to both navigate and capitalise on the opportunities presented by today's digital environments.

One notable aspect of this transformation is the emergence of digital content, which has significant implications for the way buyers advance in their purchasing processes (Järvinen & Taiminen, 2016; Terho *et al.*, 2022). In particular, the increased availability of information online enables buyers to carry out research and compare offerings before contacting the seller (Ahearne *et al.*, 2022; Terho *et al.*, 2022). Consequently, buyers are increasingly relying on digital resources to proceed in the buying process on their own terms (Holliman & Rowley, 2014; Järvinen & Taiminen, 2016; Terho *et al.*, 2022). This surge in online content has resulted in a paradigmatic shift from organisation-centric selling to customer-centric helping, fuelling the emergence of digital content marketing (Terho *et al.*, 2022). Today, organisations are increasingly utilising digital content marketing strategies to connect with their audiences, in order to both raise awareness and drive engagement (Järvinen & Taiminen, 2016; Hollebeek & Macky, 2019). Nevertheless, as content marketing is becoming increasingly popular, standing out in the crowded marketplace is a challenge (Terho *et al.*, 2022).

In attempts to create meaningful and lasting connections with customers in complex B2B environments, organisations are increasingly interested in the concept of engagement (Blasco-Arcas *et al.*, 2022). In recent years, interest in engagement among both practitioners and academics has surged (Lim *et al.*, 2022), and the advancements in digital technologies have motivated engagement research in online settings (e.g. Hollebeek, Glynn & Brodie, 2014). In particular, the impact of emerging technologies on engagement represents a growing area of interest. For example, research focused on artificial intelligence (AI) -enabled customer engagement is expanding rapidly (Hollebeek, Sprott & Brady, 2021). For researchers and practitioners alike, understanding the impact of emerging technologies, such as AI or automation, on marketing practices is a key research priority (Ostrom *et al.*, 2021; Marketing Science Institute, 2022).

To contribute to this emerging area of work, this thesis will explore marketing automation, a software tool used to automate marketing tasks including email marketing, web analytics and campaign management (Bagshaw, 2015; Buttle & Maklan, 2019). Enabled by the recent developments in information technology (such as AI and machine learning) marketing automation has quickly gained popularity among companies aiming to improve the effectiveness of their marketing efforts. In particular, the ability to extract valuable data, deliver personalised communications, and make complex decisions with automation has opened up new avenues for organisations to extract value from their relationships (Davenport, Guha & Grewal, 2021). Consequently, the software tool has emerged rapidly, and during 2023, the revenue of the global marketing automation software market has been anticipated to reach 5.4 billion U.S. dollars (Navarro, 2023). This figure is forecasted to exceed 11.2 billion dollars by 2031, more than doubling the initial projection (Navarro, 2023). Furthermore, according to a recent industry survey, approximately 80% of B2B marketers are currently utilising a marketing automation platform (Gupta, 2022), underscoring the importance of further exploring the potential of the tool in driving marketing effectiveness.

By investigating the use of marketing automation in B2B customer journeys, this thesis aims to shed light on how organisations can leverage this technology to foster online engagement with their audiences. The following section will address the focus of this thesis in more detail by presenting an outline of the research problem and rationale.

1.3. Research problem and rationale

The increasing influence of digitalisation and technological advancements in today's B2B interactions has been identified as a critical area for future academic inquiry (Ahearne *et al.*, 2022). In particular, organisations are currently emphasising the importance of building digital relationships with their customers (Kannan & Li, 2017). In fostering these connections, the role of digital content has been emphasised, and there is increasing recognition of the significant role digital content plays in driving brand engagement (e.g. Hollebeek & Macky, 2019; Taiminen & Ranaweera, 2019; Terho *et al.*, 2022).

Moreover, the emergence of new marketing technologies such as AI and automation have the potential to revolutionise the way organisations approach engagement. For example, the increasing utilisation of AI in interactive marketing has transformed the nature of customer interactions by replacing human-to-human interactions with human-to-machine interactions across various touchpoints across the customer journey (Huang & Rust, 2018; Gao & Liu, 2023). Additionally, AI-driven technologies provide notable opportunities for harnessing insights, tracking interactions, and delivering personalised experiences across customer journeys (Kumar *et al.*, 2019; Gao & Liu, 2023; Rusthollkarhu *et al.*, 2022). Consequently, the role of autonomous or non-human actors in fostering engagement represents a key area for future research, especially in complex B2B settings (Blasco-Arcas *et al.*, 2022; McGrath, O'Toole & Drummond, 2023).

Considering these research gaps, this study aims to contribute to the existing body of knowledge by examining the dynamic relationship between actor engagement, digital content marketing and the role of marketing automation. By delving into these areas, this thesis aims to enhance our understanding of how B2B organisations can leverage such technology and craft effective strategies to cultivate engagement behaviours in online settings. After all, as technology continues to advance, understanding the dynamics of engagement in automation-enhanced environments becomes increasingly crucial for organisations seeking to foster meaningful connections with their audiences to drive sustainable business outcomes. Based on this, the following aim and objectives were derived for this thesis.

1.3.1. Research aim and objectives

This thesis will focus on the potential of marketing automation in fostering B2B online engagement behaviours and contributing to organisational engagement marketing efforts. The aim is determined as follows.

"To explore the role of marketing automation in influencing online engagement behaviours in business-to-business settings".

To reach this aim, three research objectives were developed.

1. To explore the use of marketing automation in digital content marketing strategies targeted at B2B customer-company interactions.

The first research objective focuses on online interactions, by exploring the use of marketing automation in B2B digital content marketing efforts. As marketing automation tools have become increasingly prevalent in the B2B sector (Gupta, 2022), understanding the influence of these tools on digital content marketing efforts can provide valuable insights into how organisations interact with their audiences in today's increasingly digital environments. After developing an understanding of these automation-enhanced interactions, this thesis will investigate whether these interactions can influence B2B online engagement behaviours. Thus, the second research objective is formatted as follows.

2. To investigate how these online interactions fostered by marketing automation (potentially) influence B2B engagement behaviours.

While current literature has highlighted the role of digital content in fostering engagement (e.g. Hollebeek & Macky, 2019; Taiminen & Ranaweera, 2019; Terho *et al.*, 2022), the potential of automation in this process has not been thoroughly addressed. Therefore, this thesis will place focus on investigating the potential of automated interactions in fostering online engagement behaviours. Building on these insights, the third research objective is set out the following way.

3. To understand the extent marketing automation can support and advance a company's engagement marketing efforts online.

Subsequently, this thesis will explore ways in which B2B organisations can utilise marketing automation for online engagement marketing purposes. In particular, the significance of engagement marketing for building lasting relationships leading to increased satisfaction and loyalty has been highlighted (Harmeling *et al.*, 2017). Thus, by investigating how marketing automation can be harnessed for engagement marketing, this thesis will further our understanding of effective strategies and tactics to foster online engagement and build meaningful relationships with both prospective and current customers in automation-enhanced settings.

1.4. Thesis approach

This thesis explores the relationship between marketing automation and B2B online engagement behaviours from the perspective of experienced digital marketers working with marketing automation in the B2B sector. An interpretivist position is adopted, as this position aligns with the focus on gathering rich insights to generate an understanding of relatively new concepts (both marketing automation and online engagement), thus contributing to developing theory. Moreover, this position was deemed particularly suitable for research exploring complex business settings, which are often perceived as being reliant on interaction and particular circumstances (Saunders, Lewis & Thornhill, 2019). More specifically, as the focus of the study is on exploring the lived experience of the research participant, a phenomenological position is chosen.

The research was approached the following way. For this thesis, 29 phenomenological semi-structured in-depth interviews with experienced senior digital marketers working with marketing automation both in-house in B2B organisations (n=14) and digital marketing agencies or consultancies (n=15) were carried out between November 2020 and June 2021. The participants were based in two countries, Finland (n=17) and the UK (n=12). The interviews provided rich insights into both B2B online engagement throughout the customer journey, and ways marketing automation can be utilised by organisations to both capture and foster engagement online.

1.5. Thesis overview

After presenting an introduction in **Chapter 1, Chapters 2** and **3** present the literature review carried out for this thesis. **Chapter 2** is focused on B2B relationships in digital settings. The purpose of this chapter is to discuss and present literature addressing the key characteristics of today's B2B relationships that impact academic inquiry. In this chapter, B2B relationship marketing literature is first examined after which literature on customer relationship management is discussed.

Subsequently, the various effects of digitalisation on today's B2B relationships are addressed, after which the chapter will focus on marketing technology by first considering operational customer relationship management, and subsequently marketing automation. **Chapter 3** builds on this theoretical understanding by reviewing literature addressing B2B engagement. This chapter brings together various conceptualisations of engagement found in extant literature addressing both the proposed antecedents and outcomes of the concept. The chapter then continues by discussing current literature on engagement marketing.

Chapter 4 presents the methodological approach selected for the thesis. First, the research aim and objectives are outlined, after which the chapter proceeds to consider the underlying philosophical considerations informing this research. After reviewing two common philosophical positions –positivism and interpretivism– the chapter proceeds to justify why a phenomenological position was deemed most suitable for this thesis. Subsequently, both the research approach and design are presented, followed by a discussion on qualitative research methods, which informs the choice of exploratory phenomenological interviews as the most suitable method for this research. After describing the selected interview strategy, both sampling and research ethics are addressed. The chapter then proceeds to describe data collection and analysis, followed by an assessment of quality in qualitative research.

Chapter 5 provides the findings of the phenomenological interviews carried out for this thesis. These findings are discussed in relation to the B2B customer journey. First, the key findings related to the manifestations of online engagement throughout the journey are discussed, followed by the role of marketing automation throughout the journey. Subsequently, findings relating to both online engagement and marketing automation at the pre-purchase stage are presented, followed by a discussion of the findings that relate to the post-purchase stage. The chapter then proceeds to discuss the findings that inform automation-driven B2B engagement marketing efforts. In this section, first ways to measure engagement using marketing automation are outlined after which facilitating factors affect the success of such engagement marketing initiatives are identified.

Chapter 6 presents the main contributions of this thesis. These relate to two areas. Firstly, this thesis adds to our understanding of online pre-purchase engagement in automated settings and secondly, this thesis contributes to our understanding of the role of marketing automation in stimulating B2B online engagement. Both the theoretical contributions as well as managerial implications of the research findings are discussed after which limitations and areas for future research are suggested.

1.6. Chapter summary

The purpose of this chapter was to introduce the research and outline the structure of the thesis. First, to provide context, background for the research was provided which revealed how marketing automation and B2B online engagement both represent emerging areas of exploration in current marketing literature. This discussion was used to inform the research problem and rationale set out for this thesis. In this section, the research aim of *exploring the role of marketing automation in influencing online engagement behaviours in B2B settings* as well as the associated objectives were presented. Subsequently, an outline of the research approach, revealing the methodological approach selected for this study was provided. Lastly, the structure of the thesis was outlined.

2. B2B relationships in digital settings

2.1. Chapter introduction

Digitalisation –defined as the application of digital technologies that influence interactions (Lundin & Kindström, 2023)– and developments in technology have impacted B2B customer relationships and consequently brought forward notable changes to B2B marketing practices (Hofacker *et al.*, 2019). This chapter will explore these changes and discuss the key developments affecting today's B2B customer relationship management in the increasingly digital marketing environment.

The chapter is structured as follows: Firstly, a discussion on the evolution of literature on B2B customer relationships is presented, followed by a description of the key characteristics of such relationships. Then, both the emergence and conceptualisation of customer relationship management (CRM) in marketing literature are examined. Following this, the ways digitalisation is impacting the management of today's B2B customer relationships are discussed. In this section, the emergence of digital content marketing strategies is addressed, as these strategies have been noted to significantly impact B2B buying behaviour (Järvinen & Taiminen, 2016; Terho *et al.*, 2022). Subsequently, literature examining B2B customer journeys is reviewed and recent changes in B2B sales practices are considered. Moreover, as both technology and data play an increasingly big role in today's B2B marketing practices, a discussion on how data-driven marketing is utilised in relationship management is brought forward.

Subsequently, the chapter proceeds to further assess literature examining organisational efforts to manage B2B customer relationships through operational CRM. The chapter then focuses on one aspect of operational CRM –marketing automation–a key concept for this thesis. The key functionalities, organisational benefits as well as implications of both adoption and use are carefully discussed. Lastly, the chapter is concluded with a chapter summary.

2.2. Evolution of business-to-business relationships literature

B2B marketing has been thought to evolve from an initially economic-oriented perspective to one that incorporates behavioural theories (Hadjikhani & LaPlaca, 2013). Within the wider domain of marketing, industrial marketing emerged as a legitimate subfield in September 1971, when Industrial Marketing Management –the first outlet dedicated specifically for industrial marketing scholarship– was first published (Peters *et al.*, 2013). A notable transformation in the evolution of B2B marketing occurred in the late 1970s when researchers became increasingly interested in the relationships between buyers and sellers (Möller & Halinen, 2000). Culminating in the foundation of the Industrial Marketing and Purchasing Group (IMP) in the mid-1980s, research on B2B relationships experienced a notable expansion (Hadjikhani & LaPlaca, 2013). The growing interest contributed to a paradigm shift from studying transactions to studying relationships (Sheth, 1996; Hadjikhani & LaPlaca, 2013). Important milestones in research on B2B relationships include Håkansson's (1982) interaction model for researching B2B relationships, through which he became a key author representing the IMP group's network and interaction approach (Backhaus, Lügger & Koch, 2011).

The interest in relationships and interactions especially by the IMP group members evolved into two schools of thought, the network perspective (Peters *et al.*, 2013) and relationship marketing (Möller, 2013). These two positions were influenced by various connected marketing research streams that had advanced since the 1970s, including customer-supplier relationships, services research, marketing channel relationships, and the emerging field of interactive marketing –then known as database and direct marketing (Möller, 2013). Firstly, the network perspective assumes a connection between any resource of activity shared between relationships, and thus events in one relationship will always affect all connected relationships (Håkansson & Ford, 2002; Möller & Rajala, 2007). Subsequently, a network can be defined as a *"structure where a number of nodes are related to each other by specific threads"* (Håkansson & Ford, 2002, p.133). Håkansson and Ford (2002) further illustrate how in a complex business context, business units can be seen as nodes, while threads represent the relationships between these units, and therefore no single interaction, for example, a sale, payment or delivery, can be understood in isolation without reference to the relationship it remains a part of. Furthermore, individual relationships cannot be understood without considering the wider network they belong to (Håkansson & Ford, 2002).

Secondly, relationship marketing as a concept started gaining traction in the 1980s and 1990s (Peters *et al.*, 2013) and has become the dominant view in business marketing research (Möller, 2013). In a paper published in the proceedings of the American Marketing Association's services marketing conference in 1983, Berry describes relationship marketing as attracting, maintaining, and enhancing customer relationships (Berry, 2002). According to Palmer and Bejou (1994), relationship marketing can entail a range of activities, including after-sales services, loyalty programs and joint problem-solving and product development between the buyer and seller. The core idea is that through investing in relationship marketing activities, companies can build better relationships, which in turn contribute to an improved financial performance (Palmatier *et al.*, 2008). Morgan and Hunt (1994) conceptualised relationship marketing through their commitment and trust model, where the two concepts were used to predict exchange performance. Their research became a benchmark for relationship marketing theory, as it broadened the contemporary understanding of B2B marketing relationships (Hadjikhani & LaPlaca, 2013) and today, the article remains highly cited (Backhaus, Lügger & Koch, 2011; Peters *et al.*, 2013). Moreover, the popularity of relationship marketing can be seen as a counteraction to the inefficiencies and impersonality of mass marketing, as companies are shifting focus from acquiring new customers to maintaining existing ones (Kandampully, 2003).

Overall, Cortez and Johnston (2017) highlight how the nature of customer-seller relationships is the core of B2B marketing research. Therefore, for this thesis, relationship marketing provides a foundation that reinforces the selected focus on interactions and the way customer-company interactions can be enhanced with automation. Next, to gain a deeper understanding of these relationships, their unique characteristics are considered.

2.3. Characteristics of business-to-business relationships

The distinctive features of B2B markets (e.g. customers, products, environments) (Lilien, 2016) warrant further exploration of the nature of relationships in B2B settings, and thus this section will discuss a variety of key aspects that characterise these relationships. However, it should be noted that today's B2B relationships are both varied and sophisticated, as they can encompass a wider range of activities from routine supply of components to joint new product development (Hofacker *et al.*, 2019).

Firstly, B2B buyer-seller relationships are often characterised by complexity (Ford, 1980; Håkansson & Snehota, 1995; Cortez & Johnston, 2017). The typically highly sophisticated buying process in B2B exchanges contributes to this complexity (Ramaseshan, Rabbanee & Hui, 2013; Levin, Thaichon & Quach, 2016) especially as the individuals making the purchasing decisions may not be the same people that would be using the purchased product or service, and they might not be located in the same office or even the same city (Coe, 2003). Furthermore, B2B exchanges are often characterised by a large number of decision-makers and influencers (Jussila, Kärkkäinen & Aramo-Immonen, 2014; Habibi *et al.*, 2015; Cortez & Johnston, 2017), resulting in the different individuals having different priorities and needs for urgency (Coe, 2003). Hence, the decision-making cycle is slower (Habibi *et al.*, 2015), and various processes are needed to complete a transaction (D'Haen & Van Den Poel, 2013). For example, customer's own customers affect relationship management (Homburg, Wilczek & Hahn, 2014).

Secondly, in B2B settings, relationships are likely to be long-term (Ford, 1980; Håkansson & Ford, 2002), and their current state can be regarded as the outcome of previous interactions between business units (Håkansson & Ford, 2002). This is impacted by the previously described complex buying processes as well as the tendency to contract business for set time periods, such as years in a row (Håkansson & Snehota, 1995) Hence, relationships should be regarded as more than merely isolated exchanges, as they entail tactics and strategies that can contribute to organisational survival in the long-term (Håkansson & Ford, 2002; Kandampully, 2003). Therefore, for both suppliers and customers, maintaining relationships tends to be more critical (Stein, Smith & Lancioni, 2013).

B2B relationships have also been acknowledged as more predominant (Håkansson & Snehota, 1995; Cortez & Johnston, 2017) and relational than their business-to-consumer (B2C) counterparts (Hofacker *et al.*, 2019). Within the domain of relationship marketing, soft characteristics, including especially trust and commitment, have received emphasis (Morgan & Hunt, 1994; Ulaga & Eggert, 2006; Gil-Saura, Frasquet-Deltoro & Cervera-Taulet, 2009). Furthermore, other key constructs include cooperation (Lussier & Hall, 2018) and communication (Murphy & Sashi, 2018). These behavioural concepts illustrate the interdependency in B2B relationships, and how this interdependency includes more than resource interdependency (Hadjikhani & LaPlaca, 2013). Moreover, individuals in business relationships tend to form networks of personal relationships, which permit the creation of ties between organisations (Håkansson & Snehota, 1995).

Fourthly, potential buyers have also been shown to be knowledgeable, and studies have explained this by arguing that the higher level of risk involved, resulting from the typically high-value exchange (Cortez & Johnston, 2017) or the more complicated nature of B2B of products and services, influences purchasing behaviour (Habibi *et al.*, 2015). Therefore, buyer evaluations tend to be more rational, rather than emotional (Briggs & Grisaffe, 2009). Today, the increased availability of information to buyers, for example through the internet, has emphasised these developments further, creating better informed and thus more powerful customers (Ahearne *et al.*, 2022).

Nevertheless, the abovementioned characterisations are increasingly being challenged as B2B relationships change and develop into new forms (Hofacker *et al.*, 2019). After all, today's business environment is dynamic (Cortez & Johnston, 2017) and this dynamism is reflected in relationships, which must adjust to changes in the environment (Hadjikhani & LaPlaca, 2013). Hence, business relationships are not stable (Hadjikhani & LaPlaca, 2013), but they evolve over time (Holmlund, 2004). Next, to gain a detailed understanding of how these dynamic relationships are managed in B2B markets, customer relationship management (CRM) is discussed.

2.4. CRM

2.4.1. Emergence of CRM

Customer relationship management (CRM) is a relatively recent concept that was conceived in the 1980s and emerged in the 1990s together with the advances in information technology and the development of the internet (Richard, Thirkell & Huff, 2007; Möller, 2013). The roots of CRM are in relationship marketing (Reinartz, Krafft & Hoyer, 2004; Payne & Frow, 2006; Richard, Thirkell & Huff, 2007), and relationship management (Doherty & Lockett, 2008), and therefore according to some, (e.g. Gummesson, 2004), CRM can be viewed as essentially a practical application of relationship marketing. After all, initially, CRM involved mainly consultant-driven practice-based activities and tools created to aid the management of customer relationships through direct- and database marketing activities (Möller, 2013). Examples of such include loyalty programs, which enable the organisation to gather valuable information on their customers' purchasing behaviour (Mithas, Krishnan & Fornell, 2005). Nonetheless, it has been suggested that four marketing fields, including business marketing, services marketing, marketing channels and direct- and database marketing have contributed to the emergence of CRM (Kumra, 2005).

Since its emergence, CRM has evolved dramatically (Buttle & Maklan, 2019). The emergence of the Internet –and the changes it brought to managing customer relationships –allowed the concept of electronic CRM, known as e-CRM, to emerge (Xu *et al.*, 2002). e-CRM stresses the presence of data-warehousing and data-mining abilities, which enable storing customer data and related information, presenting companies with new opportunities (Gummesson, 2004). Fjermestad and Romano (2003, p.574) describe e-CRM as the *"combination of hardware, software, processes, applications and management commitment"*, and emphasise how the core of e-CRM is business change, rather than merely the adoption of technology. As technology advanced, CRM experienced another transformation. Around 2008 web 2.0 technologies, namely social media, emerged transforming communications and therefore creating what was referred to as social CRM, or CRM 2.0 (Greenberg, 2010). Web 2.0 refers to a participatory and collaborative way the world wide web was utilised, emphasising how content and applications became modified by all users (Kaplan & Haenlein, 2010). The key difference is that social CRM strategy also includes customer interactions in addition to transactional information, and emphasises the engagement of customers in conversation (Greenberg, 2010; Lipiäinen, 2015).

While some literature has acknowledged the differences between CRM as a strategy and social CRM (see e.g. Greenberg, 2010; Lipiäinen, 2015; Malthouse *et al.*, 2013), this literature review adopts the same perspective as Buttle and Maklan (2019) and does not regard social CRM as a fundamental type of CRM. Similar to Payne and Frow (2013), both e-CRM and social CRM are regarded as parts of CRM, and therefore referred to as simply *"CRM"*. Moreover, today's comprehensive CRM solutions are assumed to entail abilities to harness social media interactions and foster customer engagement, and hence, this literature review adopts the perspective that today's CRM solutions incorporate e-CRM and social CRM abilities. In addition, CRM is treated as a dynamic concept that evolves as technology, and especially data, evolves (Buttle & Maklan, 2019).

2.4.2. Definition of CRM

While CRM has emerged as a widely recognised research area, existing research has failed to agree on a single definition for the term, and various definitions exist (Yim, Anderson & Swaminathan, 2004; Ngai, 2005; Payne & Frow, 2005; Iriana & Buttle, 2007; Richard, Thirkell & Huff, 2007; Richards & Jones, 2008; Buttle & Maklan, 2019). The lack of consensus has been identified to hinder the academic discourse and add scepticism (Yim, Anderson & Swaminathan, 2004), as some have proposed how agreement on the definition is required for CRM to become a distinct discipline in management (Parvatiyar & Sheth, 2001; Iriana & Buttle, 2007). Moreover, Richards and Jones (2008) describe how a clear and consistent definition is needed to enable measurement of CRM.

To address these inconsistencies, Payne and Frow (2005) constructed a conceptual framework of CRM. While reviewing definitions of CRM, they confirm that researchers hold a variety of viewpoints and hence the descriptions of CRM vary significantly. Nevertheless, their review suggests that these various viewpoints can be grouped into at least three perspectives, and therefore CRM can be understood narrowly and tactically as a part of a technological solution, as a wide-ranging technology, and thirdly, as a holistic, strategic, customer-centric approach (Payne & Frow, 2005). In addition, from the large number of definitions, some key similarities can be identified, such as the notion of managing customer relationships and building them in return for value (Boulding *et al.*, 2005; Richards & Jones, 2008; Ngai, 2005) and the presence of an information tool or technology to support the process (Xu *et al.*, 2002; Boulding *et al.*, 2005; Payne & Frow, 2005; Richards & Jones, 2008; Greenberg, 2010; Khodakarami & Chan, 2014). Furthermore, Boulding *et al.* (2005) suggest that literature has accepted the notion of CRM as a strategic initiative. Although the presence of technology is often mentioned in various definitions, it should be made clear that CRM itself is not a technology (Kumra, 2005). Rather, technology can be viewed as a facilitator of CRM (Kumra, 2005).

Perhaps unsurprisingly, various studies have attempted to categorise CRM and build taxonomies around the debated concept (Iriana & Buttle, 2007). For this thesis, a strategic perspective of CRM over a narrow functional or technical definition is adopted. After reviewing various definitions, this thesis will utilise the definition of CRM put forward by Payne and Frow (2005, p.168):

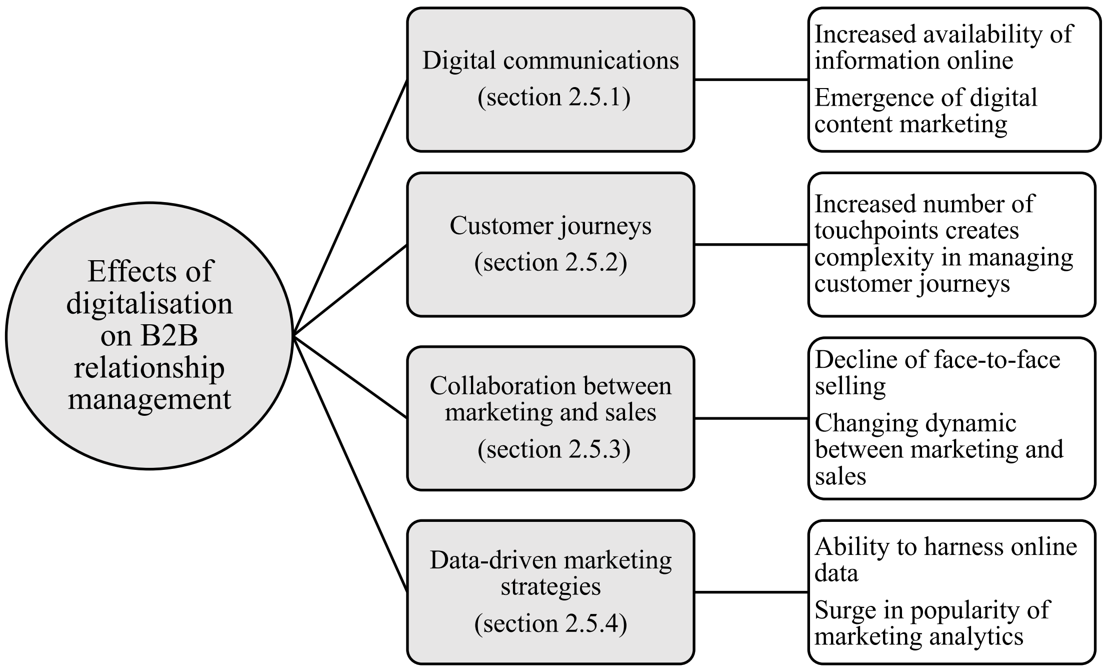
> *"CRM is a strategic approach that is concerned with creating improved stakeholder value through the development of appropriate relationships with key customers and customer segments. CRM unites the potential of relationship marketing strategies and IT to create profitable, long-term relationships with customers and other stakeholders. CRM provides enhanced opportunities to use data and information to both understand customers and co-create value with them. This requires a cross-functional integration of processes, people, operations, and marketing capabilities that is enabled through information, technology and applications".*

The abovementioned definition was chosen as it recognises CRM as a strategic initiative, and grounds the concept in relationship marketing. Furthermore, it acknowledges IT as a key component of CRM and emphasises the importance of harnessing data and customer information for CRM purposes. This provides the basis for focusing on CRM technology later in this chapter. However, a comprehensive list of alternative CRM definitions can be found in Appendix I. Before focusing on the operational components of CRM, this thesis will first discuss the changing landscape of B2B relationships, by addressing the effects of digitalisation.

2.5. Effects of digitalisation on B2B relationship management

The following section will discuss how digitalisation has reshaped B2B relationship management, by specifically focusing on digital communications (2.5.1), customer journeys (2.5.2), collaboration between marketing and sales (2.5.3) and the surge in popularity of data-driven marketing strategies (2.5.4). This discussion provides an important backdrop for explaining how relationships are managed in today's B2B settings, which justifies the selected focus of this thesis on marketing technology, and more specifically, on automation (2.7). Figure 2.1. illustrates the structure of the following sections (2.5) of this chapter.

Figure 2.1. Illustrating the impact of digitalisation on the management of B2B customer relationships



2.5.1. Effects of digital communications on B2B relationships

The development of online channels has resulted in increased connectivity among customers (Brodie *et al.*, 2019), especially through the emergence of social media and web 2.0, which has changed the way customers and suppliers search for information and interact with one another (Dennis *et al.*, 2009; Greenberg, 2010; Kietzmann *et al.*, 2011; Fader & Winer, 2012; Järvinen & Taiminen, 2016). Consequently, the emergence of digital channels has changed the expectations customers have for how communications should be carried out (Kannan & Li, 2017). For example, Hänninen and Karjaluoto, (2017) while researching the effect of marketing communications on business relationship loyalty, found that industrial customers are increasingly preferring the use of digital channels for communications. For B2B marketers, online channels provide a convenient setting for promoting the company's offering and supplying information that supports purchasing (Huotari *et al.*, 2015).

As a consequence of the growing popularity of digital channels, communications have become global and real-time (Greenberg, 2010). Additionally, interaction media has diversified, and interactions can take place on multiple formats (Ahearne *et al.*, 2022). The accessibility of the internet has resulted in the ability to easily and inexpensively upload and share information (Greenberg, 2010), empowering customers by giving them easy access to huge amounts of knowledge, for example through user-generated content (Greenberg, 2010; Agnihotri *et al.*, 2016). Therefore, instead of passively receiving information from marketers, customers are becoming more active in exchanging, creating and sharing information online (Kozinets, 1999; Fader & Winer, 2012; Tueanrat, Papagiannidis & Alamanos, 2021). Moreover, Kumra (2005) describes how the emergence of information technology has generated a shift from information asymmetry to information abundance. Customers are increasingly driven by instant access to information especially from third-party sources, as well as the wider selection and peer insights online (Greenberg, 2010). Subsequently, buyers have become more reliant on online information (Terho *et al.*, 2022).

Verhoef *et al.* (2019) have emphasised the transformative effect of digital technologies, and how the use of these technologies, such as social media, can quickly become the industry norm. If organisations are unable to adapt, they may become more likely to be replaced by their customers with other organisations that do utilise such technologies (Verhoef *et al.,* 2019). In particular, B2B organisations that have chosen not to adopt social media may feel pressure from their customers or even competitors, who want to interact on those channels (Siamagka et al., 2015). Moreover, Murphy and Sashi (2018) suggest that these digital modes of communication impact satisfaction in B2B relationships. However, it should be noted that being active on the right channels is only one step in establishing and maintaining B2B relationships. As establishing conversations remains a goal (Lipiäinen, 2015), organisations need to consider ways to engage with their audience. Therefore, customer communications are no longer merely about contact, but also about content that resonates with the customers. To address this, the concept of digital content marketing –a strategic tool to manage firm-customer interactions– is discussed next.

Content marketing involves the generation and distribution of timely and relevant content to potential buyers based on their need for information and readiness to buy, in order to both engage them and encourage them to make a purchase (Holliman & Rowley, 2014; Järvinen & Taiminen, 2016). Digital content marketing focuses on those content marketing activities that are executed online (Hollebeek & Macky, 2019). Examples of digital content include web pages, blogs, social media content, videos, podcasts, whitepapers, webinars, downloadable guides and user-generated content (Holliman & Rowley, 2014; Hollebeek & Macky, 2019).

Through the creation and promotion of these editorial materials, digital content marketing aims to attract customers with different readiness to buy towards the company and its offerings (Mansour & Barandas, 2017). Therefore, the content promoted is often free to the customer (Holliman & Rowley, 2014). Nonetheless, customers should acknowledge that in exchange for content, they are often giving consent to be personally marketed to. Some organisations utilise gated content, which refers to digital content that is not freely accessible, but in exchange for accessing or downloading the content, the viewer has to reveal their identity, by for example filling out an online form asking for their name, email and organisation (Chernov, 2017).

Nowadays, it has been established that content plays a significant role in the B2B buying process, emphasising the need for companies to develop a content marketing strategy (Holliman & Rowley, 2014). Moreover, the emergence of content marketing in B2B settings has been explained to result from a combination of factors, most notably including: 1) the need to meet the demands of the multiple decision-makers involved in the B2B buying process (Habibi *et al.*, 2015), 2) the buyers' active search and evaluation of information online (Järvinen & Taiminen, 2016) and 3) the observed decline in the effectiveness of traditional marketing methods (Holliman & Rowley, 2014).

Through creating and sharing content, companies aim to build deep and meaningful relationships with their customers (Holliman & Rowley, 2014; Wang *et al.*, 2019). After all, content enables the company to establish increasingly personal interactions at a faster pace which contributes to the formation of a deeper relationship (Huotari *et al.*, 2015). The core idea is that the content produced by the company should be perceived as valuable by the prospect or customer (Mansour & Barandas, 2017). Rather than directly persuading customers to purchase, digital content marketing efforts focus on providing additional value by being genuinely helpful and solving a problem, which then increases the customer appreciation towards the company and contributes to the long-run customer relationship, which in turn contributes to sales and profitability (Hollebeek & Macky, 2019). In other words, companies do not create content to profit from it directly, but rather indirectly, as content is utilised for attracting and retaining customers (Pulizzi, 2012). In exchange for providing content, which is of value to the customer, the company gains the customer's attention (Mansour & Barandas, 2017). Accordingly, the idea of providing value to the consumer, and optimising this value, is at the centre of digital content marketing (Holliman & Rowley, 2014; Hollebeek & Macky, 2019).

Digital content marketing differs from traditional advertising in various ways. As mentioned above, digital content marketing is typically missing the direct customer persuasion element, for example, distinct appeals to buy fundamental to advertising (Hollebeek & Macky, 2019). Additionally, as opposed to traditional marketing where the audience is passive, the audience is invited to be active in content creation through interactive mediums such as social media (Huotari *et al.*, 2015). Therefore, Hollebeek and Macky (2019) note how factors such as the quality of communication and knowing the audience's needs, as well as interdependence, non-opportunistic behaviour and shared customer-company values, all impact the success of digital content marketing efforts. Furthermore, digital content marketing efforts are characterised by lower costs than other content marketing efforts and traditional advertising, as the marginal costs for creating and distributing digital content, such as digital newsletters or e-books are low (Wang *et al.*, 2019). Through content marketing, companies aim to improve brand awareness, lead generation and conversion, customer trust and loyalty, and moreover, customer engagement (Mansour & Barandas, 2017; Wang *et al.*, 2019; Hollebeek & Macky, 2019).

Interestingly, much of the recent research on digital content marketing has been conducted in B2B settings (Taiminen & Ranaweera, 2019). Wang *et al.* (2019) tested the effectiveness of B2B content marketing on sales performance in a professional services context. By utilising panel data from a four-year time period gathered from a large international consultancy, they show that digital content can have a positive effect on business outcomes (Wang *et al.*, 2019). Additionally, Wang *et al.* (2019) find that digital content is more effective than in-person content. They suggest that valuable content can foster consumer engagement, which in turn can impact customer trust and result in positive word-of-mouth (Wang *et al.*, 2019). Moreover, although in a consumer setting, Hollebeek and Macky (2019) have developed a conceptual framework that illustrates ways digital content marketing can foster consumer trust, value and engagement. Their three-tier framework describes how digital content marketing can initially impact consumer's cognitive, emotional and behavioural engagement, which in turn advances brand-related sense-making identification and citizenship behaviours, and secondly, triggers both brand trust and attitude, thirdly, contributing to the development of consumer and firm-based brand equity (Hollebeek & Macky, 2019).

Subsequently, Taiminen and Ranaweera (2019) have responded to the demand for empirical research on digital content marketing, and through exploring B2B brand engagement in digital content marketing interactions, they offer insights into how brand engagement transforms these interactions into relationship value and trust. Additionally, they emphasise company helpfulness in digital content marketing as a major driver for customer brand engagement and suggest how providing useful content to the company's audience can also act as a signal of the company's competence and willingness to engage with its audience (Taiminen & Ranaweera, 2019). Nevertheless, Taiminen and Ranaweera (2019) note how although various marketing studies mention digital content marketing, in-depth analysis remains scarce, which highlights the need for future research.

More recently, Terho *et al.* (2022) studied contingencies that influence B2B digital content marketing performance. Based on 56 interviews with managers in 36 organisations, Terho *et al.* (2022) propose an activities-based conceptualisation of digital content marketing, outlining three key activities –generating intelligence about customers, creating a portfolio of valuable content and engaging customers through content sharing– and three key principles: inbound logic, personalisation and journey facilitation. These findings provide practical insights into how B2B organisations can implement a customer-centric orientation in their digital content marketing efforts. Additionally, Terho *et al.* (2022) suggest six moderators –content marketing agility, content championing competence, targeted digital advertising, partnerships, alignment of marketing and sales, and brand's competitive position– of performance outcomes. Thus, Terho *et al.* (2022) illustrate how digital content marketing should be regarded as a strategic communications approach encompassing more than merely creating and sharing digital content.

As acknowledged above, digital content marketing can be seen as a part of a wider inbound marketing strategy (inbound logic), where companies are adopting a *pull* rather than *push* approach to marketing communications (Holliman & Rowley, 2014; Terho *et al.*, 2022). In practice, this means companies are increasingly adopting a customer-centric approach to their customer acquisition processes where they try to attract interested prospects to engage with them through content, rather than pushing out their sales messages to everyone. Hence, instead of utilising interruptive marketing strategies, consumers are encouraged to seek out the company, highlighting the importance of getting found online through for example search engine optimisation (Halligan & Shah, 2009; Mansour & Barandas, 2017). Therefore, the audience that has been *pulled* towards the company is often referred to as the earned audience (Hollebeek & Macky, 2019). As the earned audience actively seeks out content they are interested in, they tend to become more engaged with both the content they find valuable, and the brand producing this content (Halligan & Shah, 2009; Hollebeek & Macky, 2019).

Overall, the digitalisation of communications has caused fundamental changes to the way buyers and sellers interact, affecting the ways relationships are both formed and maintained in today's B2B environments. In particular, the increased availability of information online enables buyers to carry out research and compare offerings before contacting the seller (Ahearne *et al.*, 2022; Terho *et al.*, 2022). Therefore, in addition to changing communication preferences, the surge in digital content has significant implications for the way buyers advance in their purchasing processes (Järvinen & Taiminen, 2016; Terho *et al.*, 2022). These implications will be discussed in the following section addressing the impact of digitalisation on B2B customer journeys.

2.5.2. Effect of digitalisation on B2B customer journeys

Digitalisation has been acknowledged as a driver of change for today's B2B customer journeys (Lundin & Kindström, 2023). In particular, the increasing number of customer touchpoints in an increasingly diverse number of channels and media are making customer journeys more complex (Cortez & Johnston, 2017). This section will elaborate on this complexity and discuss what characterises today's B2B customer journeys. Attention will be given to both prospective customers and customers. Prospective customers, referred to as prospects, are defined as potential customers who meet certain predefined criteria set by the selling organisation (D'Haen & Van Den Poel, 2013), such as industry relevance, location or company size.

In recent years, customer journey literature has grown rapidly and customer journeys have received notable attention from both practitioners and academics (Tueanrat, Papagiannidis & Alamanos, 2021; Hollebeek *et al.*, 2023). While this literature stream has a diverse theoretical background (Tueanrat, Papagiannidis & Alamanos, 2021), especially in B2B markets the customer buying behaviour process models have provided a foundation to this research stream (Lemon & Verhoef, 2016; Steward *et al.*, 2019). Nevertheless, these buying process models, such as the marketing or sales funnel, tend to focus on the processes related to customer acquisition. For example, D'Haen and Van Den Poel (2013) present a four-stage customer acquisition framework consisting of suspects, prospects, leads and customers. Similarly, when exploring the impact of AI on the B2B sales funnel, Paschen, Wilson and Ferreira (2020) identify seven stages of the funnel: prospecting, pre-approach, approach, presentation, overcoming objections, closing and follow-up.

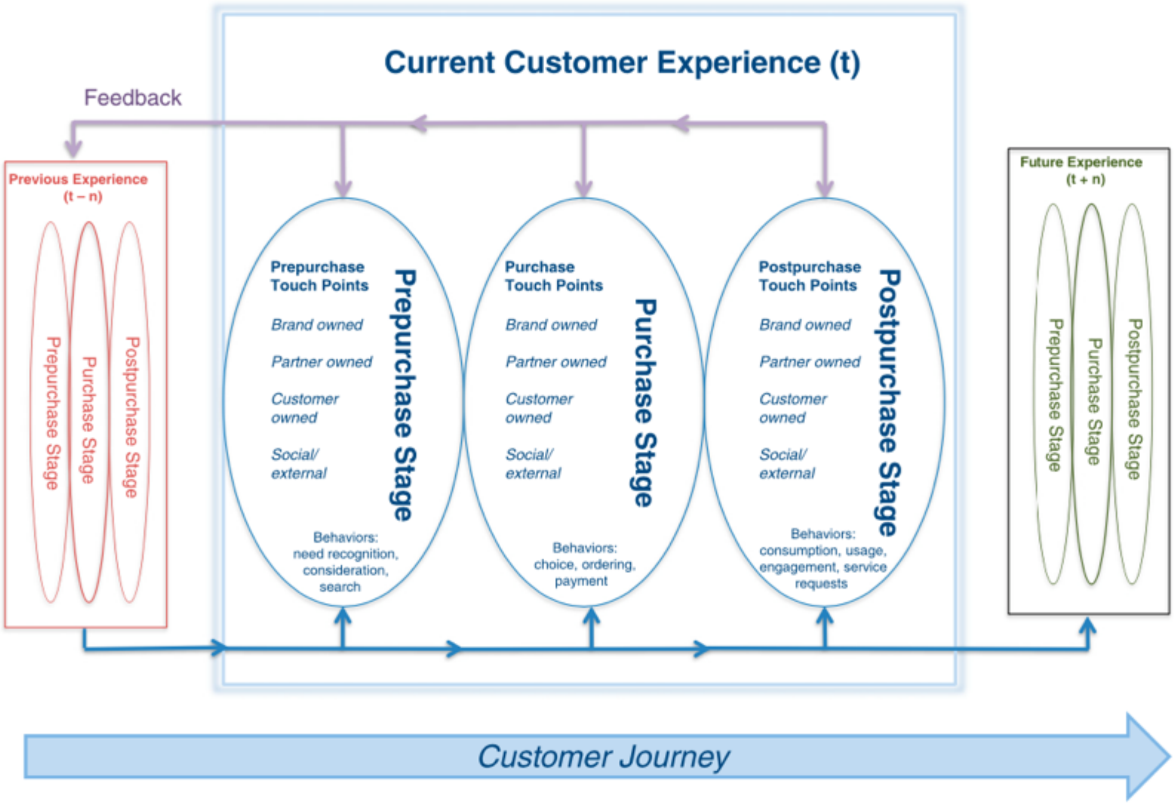
While literature on buying processes has incorporated various themes over time – including situations, influences, relationships and networks– customer journeys have been described as more intricate and involved processes (Steward *et al.*, 2019). Therefore, while recognising transactions as a core element, this thesis will consider customer journeys as encompassing more than the buying process, incorporating all experiential elements of the interactions between the customer and the supplier (Steward *et al.*, 2019). This broader perspective is aligned with the original purpose of viewing customer journeys as being embedded in the overarching concept of the customer experience (Lemon & Verhoef, 2016; Rusthollkarhu *et al.*, 2022; Homburg & Tischer, 2023). Consequently, this thesis will follow the holistic definition proposed by Lemon and Verhoef (2016, p.71) and view customer journeys as the "*process a customer goes through, across all stages and touchpoints, that makes up the customer experience".*

Touchpoints refer to any contact and interaction, verbal and nonverbal, online or offline, that relate to the supplier organisation (Witell *et al.*, 2020; Lundin & Kindström, 2023). Different touchpoints have different roles and purposes (Lemon & Verhoef, 2016; Rusthollkarhu *et al.*, 2022; Lundin & Kindström, 2023) and together they build up the customer experience (Lemon & Verhoef, 2016). Although customer journeys extend beyond firm-owned touchpoints (including customer-owned, partner-owned, social and external touchpoints, as illustrated in Figure 2.2. (Lemon & Verhoef, 2016), this thesis is focused on the ways organisations utilise emerging technologies such as automation in fostering interactions with their audiences, and thus our focus is on touchpoints that suppliers control directly.

Lemon and Verhoef (2016) divide the customer journey into three phases: pre-purchase, purchase and post-purchase. In the pre-purchase phase, customer behaviours include need recognition, search and consideration (Lemon & Verhoef, 2016). In turn, purchase-phase behaviours include choice, ordering and payment, while post-purchase behaviours include use and consumption of the product or service, engagement and service requests (Lemon & Verhoef, 2016). Figure 2.2 illustrates the model proposed by Lemon and Verhoef (2016, p.77) showcasing the three journey phases, as well as the associated customer behaviours.

Figure 2.2. Process model for the customer journey and experience

(Lemon and Verhoef, 2016)



While dividing the customer journey into stages can aid comprehension of the concept (Purmonen, Jaakkola & Terho, 2023), in reality, B2B buying journeys are not linear (Järvinen & Taiminen, 2016). Hence, journeys have also been portrayed as recurring cycles with loyalty loops, which shifts the focus from purchase to the long-term iterative processes (Purmonen, Jaakkola & Terho, 2023). In particular, the multi-actor nature of B2B contexts highlights the need to consider both the individual and collective paths in the purchasing journey (Purmonen, Jaakkola & Terho, 2023). Thus, Purmonen, Jaakkola and Terho (2023) encourage marketers to consider the needs and goals of various buying and usage centre members, to build an understanding of organisation-level intention. In these processes, the role of technology can be highlighted, as technological solutions can help marketers map, model and design complex journey-related processes (Steward *et al.*, 2019; Rusthollkarhu *et al.*, 2022).

Overall, digitalisation has been noted to contribute to various changes to customer journeys, impacting touchpoints, roles and processes (Lundin & Kindström, 2023). For example, the front end of the customer journey is extending as customers initiate their journeys earlier, impacting how journeys are shaped (Lundin & Kindström, 2023). Moreover, technological advances have diversified buyer-seller interactions (Ahearne et al., 2022), creating opportunities for customers to be more active in their journeys (Lundin & Kindström, 2023). In turn, customers' increased activeness contributes to changes in roles, emphasising the dependence of these roles in delivering a collective experience across touchpoints (Lundin & Kindström, 2023). Hence, digitalisation can impact cross-organisational coordination (Lundin & Kindström, 2023).

The next section will elaborate on the need for cross-organisational collaboration – especially between marketing and sales– by addressing how digitalisation has impacted B2B selling practices.

2.5.3. Collaboration between marketing and sales

Salespeople have a critical role in the acquisition and maintenance of B2B customer relationships, as traditionally they have been responsible for the acquisition and maintenance of the company's most valuable asset –the customers (Zoltners, Sinha & Lorimer, 2008; Lussier & Hall, 2018). Moreover, salespeople are responsible for communicating value propositions, understanding the customer's value drivers and providing information about the selling company to the customer (Hohenschwert & Geiger, 2015). Accordingly, the sales force represents a notable investment for companies (Zoltners, Sinha & Lorimer, 2008). Perhaps unsurprisingly, extant literature has widely explored various salesperson characteristics to assess factors that contribute to the formation of quality relationships (Palmer & Bejou, 1994). Additionally, research has established how sales interactions play an important role in value creation in B2B relationships (Hohenschwert & Geiger, 2015), which highlights the key role of sales in the customer-supplier relationship.

However, traditional face-to-face selling is experiencing a decline (Coe, 2003). Online channels represent a more cost-effective way to enhance supplier-buyer relationships (Venkatesan & Kumar, 2004). Additionally, customers are more knowledgeable, as they are now able to compare alternatives online and read about others' buying experiences before contacting the salesperson (Wiersema, 2013). Hence, customers are increasingly moving to channels controlled by the marketing team, such as the company website or social media channels, and therefore rely less on traditional sales material such as catalogues or interactions at trade shows, or moreover salespeople, as the source of information or the facilitator of exchanges (Wiersema, 2013). This represents a stark contrast to Crosby, Evans and Cowles who in 1990 (p.68) described how *"the service salesperson is the primary -if not sole- contact point for the customer both before and after the purchase"*.

While traditionally marketing departments used to provide sales teams with sales material, salespeople are now increasingly creating their own content, such as blogs, to match the consumer's demand for information and active conversation (Leboff, 2016). This is resulting in a situation where marketing and sales departments are increasingly working to achieve the same outcomes by using the same, increasingly digital channels (Leboff, 2016). Following this, the role of marketing is shifting to incorporate more of a strategic leadership position, which may be received with resistance in sales-driven companies (Wiersema, 2013). Additionally, marketing and sales functions have a history of conflict (Homburg & Jensen, 2007). Often described as a misalignment of marketing and sales, this conflict refers to situations where marketing accuses sales of not following up on the sales leads they provide, while sales accuse marketing of not providing enough good-quality sales leads (Patterson, 2007). These cooperation issues have been noted to contribute negatively to the market performance of the business unit (Homburg & Jensen, 2007). As the tasks between marketing and sales are becoming overlapping, the lines between the departments are becoming blurred, and the risk of completing the same tasks twice increases.

Subsequently, Järvinen and Taiminen (2016) have identified a need for the strategic alignment of sales and marketing departments. In their study, they explored the way marketing automation can support content marketing strategies and the related selling processes in a B2B setting. To avoid conflict and promote both transparency and cooperation between the two departments, Järvinen and Taiminen (2016) recommend creating aligned objectives and integrating marketing and sales systems. Moreover, (Wiersema, 2013) notes how the increasing mutual dependence between the two functions could drive the creation of a stronger interface. In particular, moving away from a sales-driven model to a customer-driven model could increase collaboration between the two functions, as well as with customers (Wiersema, 2013).

Similarly, Patterson (2007) while assessing the marketing and sales alignment, recommends the adoption of a customer relationship lifecycle approach, where marketing and sales are aligned through a common focus on creating, maintaining and increasing the value of customers. After all, Lundin and Kindström (2023) emphasise the importance of a collective team effort as digitalised touchpoints become more accessible and even shared, decreasing the importance and dependence on individual roles. However, in levering these touchpoints, and thus enabling seamless collaboration, insights into customer online behaviours are imperative. Therefore, next attention is given to the ways organisations capture and harness online data to foster relationships with their audiences.

2.5.4. Data-driven marketing practices

In recent years, the rise of data-driven marketing campaigns has notably affected marketing practices and the discipline has become increasingly reliant on big data analytics (Del Rowe, 2016). Big data refers to huge amounts of various forms of data, from diverse sources, and its constant processing (Wiesenberg, Zerfass & Moreno, 2017). In particular, recent developments in information technology have made tracking and collection of customer data, including for example the number of website visits, customer service contact logs, and previous purchases, more available for companies (Brown *et al.*, 2017). Such types of data points, added together with for example customer online login information and communication preferences, allow marketers to gather a holistic picture of the potential or current customer over time, which in turn allows for more customised communications and relationship management (Wilson, 2010). This marks a considerable shift for industrial marketing, which traditionally has been seen as having little customer data (Lilien, 2016). Nonetheless, today's B2B marketers are described to be overwhelmed by the increased availability of data (Cortez & Johnston, 2017). Moreover, this availability of data has made measuring the results of digital marketing investments more straightforward, creating pressures to track and measure the company's performance through web analytics (Järvinen & Karjaluoto, 2015).

According to Wedel and Kannan (2016, p.98) *"marketing analytics involves the collection, management, and analysis –descriptive, diagnostic, predictive, and prescriptive– of data to obtain insights into marketing performance, maximise the effectiveness of instruments of marketing control, and optimise firms' return on investment (ROI)"*. Through monitoring and analysing buying behaviour, companies aim to improve the efficiency and effectiveness of their sales and marketing actions, and therefore optimise spending (Lilien, 2016; Kannan & Li, 2017). Moreover, performance measurement reduces the ambiguity around strategic objectives, allows the organisation to communicate its objectives, and enables the alignment and refinement of strategy (Smith, 2006). However, traditionally marketing measurement has been noted to suffer from a lack of objective measures, as measures such as customer satisfaction or brand loyalty are subjective, and thus difficult to convert to financial metrics for senior management (Järvinen & Karjaluoto, 2015).

Furthermore, Ling-yee (2011) points out how marketers are increasingly asked to demonstrate the accountability of the marketing function by providing metrics that record the ROI of marketing efforts. Utilising web analytics can help overcome these disparities, as web analytics consist of standardised quantitative metrics that can be set for a variety of objectives and thus are easier to communicate to the senior management (Järvinen & Karjaluoto, 2015). Hence, in the future, the significance of marketing analytics has been predicted to increase, and consequently, the Marketing Science Institute (2022) has declared *"measurement and analytics"*, as one of their 2022-2024 research priorities. This emphasises the need for research that furthers our understanding of ways customer data can be harnessed to drive marketing insights in our increasingly technology-dependent environment.

The role of technology should be highlighted, as organisations are increasingly interested in the use of emerging technologies such as AI and Internet of Things (IoT) among others, to generate actionable insights on customers (Gupta *et al.*, 2020). Overall, AI (see e.g. Huang & Rust, 2018; Davenport *et al.*, 2019; Huang & Rust, 2021) robotics, blockchain and IoT, have been described to have a significant impact on organisations and business relationships (Verhoef *et al.*, 2019; Gupta *et al.*, 2020). Moreover, these emerging technologies enable access to previously unavailable insights (Gupta *et al.*, 2020). The significance of this is illustrated by Terho *et al.* (2022) who propose intelligence creation on customer journeys as the foundation of effective digital content marketing. Consequently, the need for marketers to be able to effectively harness big data should be emphasised (Järvinen & Karjaluoto, 2015). Moreover, the role of AI in harnessing insights and thus enabling the creation of personalised experiences throughout the customer journey has been highlighted (Gao & Liu, 2023; Rustholkarhu *et al.*, 2022). Therefore, as digital technologies evolve, researchers' attention should be directed towards investigating ways these advancements can be utilised to benefit organisations (Kannan & Li, 2017; Steward *et al.*, 2019).

On the other hand, various obstacles and challenges for utilising big data analytics for relationship management have been brought forward. Firstly, challenges may relate to the lack of sufficient know-how and understanding of analytics (Wiesenberg, Zerfass & Moreno, 2017). Secondly, big data and marketing analytics can bring forward associated challenges to security and risk management (Wiesenberg, Zerfass & Moreno, 2017). Regulation and privacy technology have developed slower than technologies related to data collection, storage and processing (Wedel & Kannan, 2016). Related to this, the potential privacy concerns related to the use of big data analytics pose various challenges for marketing and advertising professionals (Wiesenberg, Zerfass & Moreno, 2017), especially as abilities related to data collection and personalisation develop (Wedel & Kannan, 2016). After all, the threat of security breaches increases as organisations collect more individual-level data points (Gupta *et al.*, 2020) and the unethical use of information access poses significant risks to B2B customer relationships (Behera & Bala, 2023).

Consequently, Kannan and Li (2017) report how customers' concern related to their privacy is rising. The growing concern can be seen from the emergence of the term *"dataveillance"*, which according to (Esposti, 2014, p. 209) refers to the *"systematic monitoring of people or groups, by means of personal data systems in order to regulate or govern their behaviour"*. After all, companies are nowadays able to collect data from various sources in order to build improved customer profiles (Wedel & Kannan, 2016). This has led to the mosaic effect, which Wedel and Kannan (2016) describe as the way companies combine such data to access otherwise private information that only comes forward when various data sources are integrated. Subsequently, some authors have gone as far as arguing that dataveillance is now the foundation of customer relationship management (Wood & Ball, 2013, p.50).

Nonetheless, it should be remembered that respecting the privacy of the customers is good business practice (Wedel & Kannan, 2016). For example, permission-based communications can be regarded as the other cornerstone of an inbound marketing strategy (Halligan & Shah, 2009; Hollebeek & Macky, 2019). After all, consumer permission, i.e. opt-in, should be regarded as a prerequisite for digital content marketing (Koiso-Kanttila, 2004; Hollebeek & Macky, 2019). Therefore, for today's organisations, the challenge lies in finding the balance between exploiting the opportunities brought by emerging technologies and complex data, without losing focus from the core purpose and need to nurture relationships with customers, suppliers and the wider business network.

So far, this chapter has provided comprehensive insights into how digitalisation has impacted communications, customer journeys, the collaboration between marketing and sales and the ability to harness customer data, all of which affect the management of today's B2B customer relationships. The following sections of this chapter will build on these insights on customer relationship management by discussing operational CRM, and subsequently marketing automation, which remains the focal concept of this thesis.

2.6. Operational CRM

After providing thorough perspectives on the management of B2B relationships in today's increasingly digital environments, the following sections of this chapter will focus on the technological processes utilised in CRM initiatives. Building on the conceptual foundation of CRM discussed earlier in this chapter (in section 2.4), the following sections will zoom in on processes organisations employ in carrying out CRM initiatives. Operational CRM will be introduced, after which this chapter will proceed to discuss one specific solution, marketing automation, in detail. Subsequently, the benefits (2.7.1) and the implications of (2.7.2) its use, as identified in current literature, are addressed before a chapter summary is presented.

In examining components of CRM, this literature review will follow Buttle and Maklan's (2019) taxonomy of CRM, and divide it into three subsections: strategic, operational and analytic CRM. The following table summarises the dominant characteristics of each of the three types of CRM, as described by Buttle and Maklan (2019, p.6).

Table 2.1. Types of CRM

Type of CRM	**Dominant Characteristics** (according to Buttle & Maklan, 2019)
Strategic	Strategic CRM is the customer-centric business strategy that aims at winning, developing and keeping profitable customers
Operational	Operational CRM focuses on the integration and automation of customer processes such as selling, marketing and customer service
Analytical	Analytical CRM is the process through which organisations transform customer-related data into actionable insight for use in either strategic or operational CRM

Out of the three types of CRM, this literature review will focus on operational CRM, as the technological applications of CRM fall under this category. However, as harnessing data emerges as a core aspect of these technologies, analytical CRM will also be addressed in these discussions. Operational CRM focuses on the ways technologies can be used to automate customer-facing business processes, and therefore examples of operational CRM include marketing automation, sales force automation and service automation (Buttle & Maklan, 2019). From the three concepts, this thesis will focus on marketing automation, which will be discussed in detail in the following sections.

2.7. Marketing automation

Marketing automation can be viewed as a category of marketing tools that enable the automation of marketing tasks (Rusthollkarhu *et al.*, 2022). While marketing automation is a new concept, the emergence of automation in marketing has been foreseen decades ago. Already in 1960 Head (pp.36-37) describes how *"new methods of automation will make marketing information available much faster than ever before, and supply data previously not available at all"* emphasising how for the marketing man, *"only careful planning based on facts will produce a competitive edge. And automation is the best means of recording data quickly and economically"*. Moreover, in 1998 Bucklin, Lehmann and Little, noted how three factors –enhanced productivity, improved decision-making, and the demand for mass customisation– would drive the emergence of marketing decision automation systems.

Marketing automation as we know it today emerged from email marketing systems that offered automated segmented campaigns (Redding, 2015). As software vendors have expanded their functionalities, marketing automation increasingly overlaps with CRM systems (Redding, 2015). Consequently, different perspectives on the abilities of CRM solutions and marketing automation exist. Nevertheless, Wood (2015) has argued that while marketing automation can enhance the effectiveness of CRM, it cannot replace it. Moreover, marketing automation can be seen as an important component of CRM as it enables marketing activities to be scaled up in a manner that improves the transparency, accountability and rigour of marketing processes (Buttle & Maklan, 2019). Examples of state-of-art marketing automation software providers include HubSpot, Eloqua, Marketo and Salesforce (Mero, Tarkiainen & Tobon, 2020).

According to Buttle and Maklan (2019, p.238), marketing automation is *"the software-based application of processes, rules and algorithms that execute marketing activities with little or no human intervention"*. Similarly to CRM, current literature has presented various perspectives on marketing automation, as some consider it merely a marketing technology or a tool, while others describe marketing automation as a strategic initiative and a core strategic marketing resource (Mero, Tarkiainen & Tobon, 2020). Moreover, while marketing automation has sparked wide interest among practitioners, academic inquiry into the software tool has progressed at a slower pace. In particular, empirical research remains at an early stage (with the exception of Järvinen & Taiminen, 2016; Mero, Tarkiainen & Tobon, 2020; Mero *et al.*, 2022). Nevertheless, a list of definitions, gathered from recent publications, is presented in the following table.

Table 2.2. Definitions of Marketing Automation

Authors	**Definition of marketing automation**
Grossberg (2014, p.2)	"… the field of MA has mushroomed to become an entire ecosystem of different types of software platforms located in "the cloud" designed to help firms improve their efficiency and effectiveness at 1) gathering and deploying marketing intelligence, 2) generating and cultivating sales leads, and 3) automating routine workflow that guides a potential customer down through the marketing funnel from first contact or inquiry to final sale."
Bagshaw (2015, p.84)	"Aside from being the latest buzzword, in simple terms marketing automation is the use of software to automate marketing processes, such as customer segmentation, customer data integration and campaign management."
Buttle & Maklan (2015, p.232)	"Marketing automation is the application of computerised technologies to support marketers and marketing management in the achievement of their work-related objectives."
Grossberg, (2015a, p.1)	"The first of these is marketing automation, where artificial intelligence and algorithms are used to support predictive analytics that enhance an organisation's chances of winning a customer and of optimising the reach for such potential customers."
Järvinen & Taiminen, (2016, p.165)	"Marketing automation involves a software platform that can be used to deliver content based on specific rules ret by users. The objective is to attract, build and maintain trust with current and prospective customers by automatically personalising relevant and useful content to meet their specific needs (HubSpot, 2015; Kantrowitz, 2014)."
Murphy (2018, p.5)	"At its heart, marketing automation is a communication and engagement platform that requires content to be delivered to an audience."
Buttle & Maklan, (2019, p.238)	"Marketing automation is the software-based application of processes, rules and algorithms that execute marketing activities with little or no human intervention."
Mero, Tarkiainen & Tobon, (2020, p.213)	"We define MA [Marketing Automation] as a technology leveraged to improve the effectiveness and efficacy of marketing operations via automated, personalised and analytics-driven activities."

Nevertheless, according to Kantrowitz, (2014) the core idea of marketing automation is to enable the company using the software to send the potential customer the right message at the right time, and thereby respond to a specific action with a specific message. Through this, the company can tailor its actions to best meet the individual customer's needs at each stage of their customer journey (Buttle & Maklan, 2019). For example, if a prospect or customer shows interest by interacting with a blog post on a certain topic, this interaction may trigger subsequent automated actions, such as an invitation to a webinar on that same topic being sent to them (Terho *et al.*, 2022). Therefore, to run effectively, marketing automation requires both software and huge amounts of data (Buttle & Maklan, 2019).

State-of-art marketing automation solutions offer a wider range of functionalities that evolve as technology advances. Examples of functionalities include campaign management, event-based marketing and promotional management (Tanner *et al.*, 2005) as well as lead qualification and automated content delivery (Järvinen & Taiminen, 2016). Buttle and Maklan (2019) approach the functionalities of marketing automation by dividing them into three broad clusters: marketing campaign support (e.g. email campaign management) online and digital marketing support (e.g. content management), and strategic and other broader marketing management support (e.g. automated workflows). A list of these functionalities proposed by Buttle and Maklan (2019) can be found in the following table.

Table 2.3. Functionalities of Marketing Automation

Marketing campaigns	Online-digital marketing	Strategic and other marketing
• Campaign management (Inc. direct mail and email) • Event-based marketing (also known as trigger marketing) • Marketing optimisation • Tele-marketing	• Social media marketing • Programmatic advertising • Content management • Keyword marketing • Search engine optimisation • Web analytics	• Integrated marketing management • Marketing performance management • Loyalty management • Partner marketing • Product life-cycle management • Asset Management • Document Management • Marketing analytics • Workflow development

Moreover, when studying the adoption of marketing automation in a start-up Mero *et al.* (2022) described three domains of adaptation: sales lead management process, content marketing process and customer intelligence process. These three domains can be viewed as the key areas of the marketing and sales processes that marketing automation can impact, and therefore, the key functionalities of the software tool can be viewed to relate to these three areas. The next section will elaborate on these functionalities, by addressing the associated benefits of the software tool. First, benefits related to marketing intelligence are addressed, followed by benefits related to content marketing, and thirdly the sales lead process, followed by a discussion on other relevant benefits acknowledged in extant literature.

2.7.1. Benefits of marketing automation

A key publication discussing the benefits of marketing automation is Järvinen and Taiminen's (2016) study assessing marketing automation in relation to B2B content marketing processes. In their study, they note how marketing automation, similarly to web analytics, capitalises on tracking an individual’s behaviour online. This is done by tracking the individual’s navigation paths and page views through utilising cookies and the IP address (Järvinen & Taiminen, 2016). Nonetheless, marketing automation differs from web analytics as it has more powerful tracking capabilities, as the tool can track and store individuals’ behaviour for a long time (Järvinen & Taiminen, 2016). In addition to passive tracking, marketing automation also utilises active means of learning about the prospect, which involves asking questions, such as asking the individual to identify themselves by completing a contact form (Järvinen & Taiminen, 2016). Similarly, Grossberg (2015a, 2016) notes how the online tracking abilities of marketing automation software enable the creation of behaviour-based campaigns that react to potential changes in customer behaviour.

With regard to digital content marketing efforts, marketing automation enables effective targeting and automated personalisation of the company’s marketing messages across channels (Mero, Tarkiainen & Tobon, 2020). Thus, marketing automation can be noted to have a significant role in the delivery and management of digital content to both prospective and existing customers (Terho *et al.*, 2022). This is supported by Murphy (2018) who acknowledges advanced personalisation and customer segmentation abilities as a key benefit of the software tool. Moreover, Heimbach, Kostyra and Hinz (2015) as well as Järvinen and Taiminen (2016) mention the effective distribution of personalised content, which Wood (2015) notes to aid the creation of personalised experiences.

Focusing on the customer journey, Järvinen and Taiminen (2016) conclude that aligning organisational selling processes with content marketing efforts through the use of marketing automation can result in business benefits, such as the increased efficiency of prospect selection and lead qualification. Paschen, Wilson and Ferreira (2020) make similar findings when studying the impact of artificial intelligence on the B2B sales process. They describe how within the prospecting phase, lead generation and lead qualification are tasks that can be enhanced via the use of tools utilising artificial intelligence (such as marketing automation), as these tools can help construct rich customer profiles from both structured and unstructured data and utilise predictive analytics in this process (Paschen, Wilson & Ferreira, 2020). When approaching prospective clients, the use of artificial intelligence can add value to lead nurturing, through the ability to employ customised messaging across different channels (Paschen, Wilson & Ferreira, 2020). Therefore, marketing automation can be noted to aid the generation, qualification and management of sales leads (Järvinen & Taiminen, 2016).

Several authors mention increased efficiency as a key benefit of adopting marketing automation (Biegel, 2009; Grossberg, 2015a; Wood, 2015; Järvinen & Taiminen, 2016; Tonkova, 2016; Buttle & Maklan, 2019). This enhanced efficiency has been described to stem from the company’s ability to develop more streamlined and therefore cost-effective workflows (Buttle & Maklan, 2019). Moreover, Wood (2015) emphasises how the level of efficiency and timeliness offered by automation just cannot be matched by human action. Biegel (2009) describes how this efficiency translates into more effective marketing, which enables the organisation to collect superior returns on their marketing investments. Related to this, Bagshaw (2015) acknowledges how marketing automation can help the organisation cut costs by reducing the amount of human resources required to get prospects through the organisation’s sales funnel. In turn, Järvinen and Taiminen (2016) relate the efficiency gains back to the prospect selection process, where the automated classification system can help streamline sales lead processes.

Another key organisational benefit is improved productivity, which stems from the marketer's ability to run a very large number of simultaneous campaigns with marketing automation (Grossberg, 2014; Heimbach, Kostyra & Hinz, 2015; Buttle & Maklan, 2019). Additionally, marketing automation has been acknowledged to result in greater accountability, as the software enables data collection and analysis from these campaigns, in nearly real-time, contributing to better marketing intelligence, thus improving the organisation's responsiveness, transparency and subsequently, managerial decision-making (Buttle & Maklan, 2019). Moreover, this increased transparency brings visibility to the customer journey, allowing the marketer to see which customer touchpoints bear the most weight in relation to the customer's decision to purchase (Mero, Tarkiainen & Tobon, 2020). As a result, marketing automation has been proposed to help align the objectives of both sales and marketing divisions (Redding, 2015; Järvinen & Taiminen, 2016; Murphy, 2018).

Furthermore, current literature on marketing automation has linked the concept with fostering customer engagement (Del Rowe, 2016; Murphy, 2018; Buttle & Maklan, 2019; Terho *et al.*, 2022). For example, Buttle and Maklan (2019) describe how the use of the tool improves customer engagement, while Murphy (2018) presents marketing automation as a communication and engagement platform. Despite this, in-depth empirical evidence on the way the tool can be used to drive engagement has not yet been presented. Nonetheless, engagement has been described as a key objective for content marketing (Taiminen & Ranaweera, 2019; Hollebeek & Macky, 2019; Terho *et al.*, 2022) and marketing automation has been noted to improve the efficiency of content marketing efforts (Järvinen & Taiminen, 2016). Additionally, Terho *et al.*(2022) acknowledge how marketing automation can be used to track engagement with digital content. Thus, the potential of marketing automation in fostering customer engagement has been acknowledged, and to gain a deeper understanding, the relationship between the two concepts should be investigated further. To address this, the following chapter will examine B2B engagement. However, before turning to literature on engagement, the implications (including potential drawbacks) of the use of marketing automation are discussed, followed by a chapter summary.

2.7.2. Implications of the use of marketing automation

Organisations considering the adoption of marketing automation should consider a variety of potential challenges related to the adoption and use of the software. Mero, Tarkiainen and Tobon (2020) have addressed the managerial reasoning during the adoption of the software tool in industrial B2B companies. They identify three sequential stages of marketing automation adoption, 1) sensemaking, 2) structuring and 3) reforming, as well as five key domains of marketing automation –customer knowledge, information systems infrastructure, analytics, interdepartmental dynamics and change management– all of which play a significant role in the adoption process (Mero, Tarkiainen & Tobon, 2020). Nonetheless, in their study, adopting marketing automation was seen as causing significant uncertainty, which was explained by 1) technological uncertainty resulting from marketing automation being a novel technology and 2) the software's interaction with the market environment, where factors outside of the company's direct control, such as customers are other stakeholders, cause uncertainty (Mero, Tarkiainen & Tobon, 2020). Therefore, Mero, Tarkiainen and Tobon, (2020) note how organisational structures and processes, as well as organisational culture, impact the use of marketing automation and benefits derived from the software.

More recently, Mero *et al.* (2022) while exploring agile logic in Software as a Service (SaaS) implementation, identified various constraints related to the adoption of marketing automation. Firstly, specifically related to the marketing automation technology, three perceived constraints were identified (Mero *et al.*, 2022). These included the manual set-up of automation rules and the creation of automation objects, as well as the limitations related to automated data collection (Mero *et al.*, 2022). Secondly, perceived constraints related to the case organisation included the limited expertise on the use of marketing automation, lack of existing marketing content and the lack of both human and monetary resources especially as the case company was a start-up (Mero *et al.*, 2022). Similar findings have also been suggested by other authors. Grossberg, (2015a, 2016) and Murphy (2018) note how the acquisition of skilled talent may be a significant challenge. Moreover, Kasabov and Warlow (2009) also note how adopting marketing automation may lead to managers losing control if they do not understand how the algorithms work. Additionally, knowing exactly what can be automated, and moreover what should – and should not– be automated, requires judgement (Grossberg, 2015a, 2016). Therefore, it can be argued that leadership and managerial vision play a significant role in the success of the adoption process.

With regard to the technology itself, marketing automation requires significant data management resources, and the tool needs to be implemented in a way that integrates it with the company's business processes (Keens & Barker, 2009). Additionally, as marketing automation relies on analytics and customer information harnessed online, breaching customer privacy has been described as one of the greatest challenges that companies utilising the software face (Heimbach, Kostyra & Hinz, 2015). Moreover, Luke (2013) notes how automated communications are often too generic and therefore fail to create a meaningful connection with the prospective client.

Overall, it can be noted how marketing automation represents a significant investment for organisations in terms of the monetary, time and human costs associated with the adoption of the software (Grossberg, 2015a; Järvinen & Taiminen, 2016). Moreover, succeeding adoption, continuing investment and realistic expectations have been noted as key factors impacting the success of marketing automation initiatives (Murphy, 2018).

2.8. Chapter summary

This chapter discussed the management of B2B relationships in today's increasingly digital and technology-dependent environment. The chapter commenced with a summary of the evolution of B2B relationship literature, after which relationship marketing was acknowledged as the foundation of the thesis, reinforcing the selected focus on B2B interactions, and how they can be enhanced with automation. Subsequently, the key characteristics of B2B relationships were addressed, most notably drawing attention to their complex and dynamic nature (Ford, 1980; Håkansson & Snehota, 1995; Cortez & Johnston, 2017).

The chapter then proceeded to discuss the management of customer relationships in today's B2B environments. Attention was given to the emergence of CRM in marketing literature, after which the conceptualisation of the term was discussed. Following this, ways digitalisation has impacted the management of B2B relationships were addressed by examining various factors, including digital communications, customer journeys, the collaboration between marketing and sales and the surge in popularity of data-driven marketing strategies. In particular, the increased availability of online information and organisational digital content marketing strategies were noted to impact the way prospects and customers proceed in their journeys (Ahearne *et al.*, 2022; Lundin & Kindström, 2023), consequently impacting the role of salespeople (Wiersema, 2013). Moreover, the increased online interactions allow organisations to gather data on their customers and consequently, the way such insights can be harnessed to foster relationships in our increasingly technology-dependent environment represents an important gap in our understanding (Marketing Science Institute, 2022).

After addressing these wider developments, the chapter proceeded to focus on the role of technology in managing customer relationships in today's B2B settings. This was approached by first introducing operational CRM, after which one aspect of operational CRM –marketing automation– was focused on. Marketing automation was defined as a software tool used to automate marketing activities across channels (Buttle & Maklan, 2019). While these solutions typically have a number of functionalities, the key abilities of the tool relate to supporting marketers in processes associated with sales lead management, content marketing and customer intelligence (Mero *et al.*, 2022). Nevertheless, the review of literature on marketing automation revealed how academic inquiry is still at an early stage and marketing automation has largely been examined through articles (e.g. Kasabov & Warlow, 2009; Kantrowitz, 2014; Grossberg, 2016), editorials (e.g. Biegel, 2009) and opinion pieces (e.g. Bagshaw, 2015). Moreover, current empirical work has largely focused on the adoption of the software tool (e.g. Mero, Tarkiainen & Tobon, 2020; Mero *et al.*, 2022). Subsequently, the potential of marketing automation in fostering online interactions, and more specifically online engagement, was identified as an important gap in our understanding.

In summary, this chapter has studied the first two principles of relationship marketing; the acquisition and maintenance of customer relationships (Berry, 2002), in the context of today's B2B relationships. The next chapter will address the third principle –enhancement– from the perspective of customer engagement in B2B settings.

3. Engagement in B2B settings

3.1. Chapter introduction

As noted in the previous chapter, the increasing interactivity and connectivity brought by digitalisation creates both notable opportunities and challenges for B2B organisations looking to foster relationships with their customers. In parallel, both organisations and academics have become increasingly interested in the concept of engagement –defined as the "*dynamic and iterative process that reflects actors' dispositions to invest resources in their interactions with other connected actors in a service system"* (Brodie *et al.*, 2019, p.174). Moreover, engagement can be viewed as a conceptual lens for examining customer motivations to interact with the organisation's digital content (Hollebeek & Macky, 2019; Taiminen & Ranaweera, 2019; Wang *et al.*, 2019; Terho *et al.*, 2022) underlining the need for a detailed exploration of the concept.

This chapter is organised in the following way. Firstly, the evolution of the concept is addressed through a discussion on the conceptualisation of customer engagement in marketing literature. Moreover, as literature exploring engagement has evolved from a narrow to a broader focus, this broadened scope is acknowledged by considering recent literature on actor engagement, and thus advancing the discussion from customers to actors. Following this, literature addressing the antecedents of engagement is carefully reviewed, after which engagement behaviours are focused on. Subsequently, the outcomes of engagement are explored, after which the deliberate organisational efforts to foster engagement, known as engagement marketing strategies, are discussed. Following this, a chapter summary is presented.

3.2. Conceptualisation of engagement in marketing literature

Customer engagement is a recent research phenomenon, as interest in the topic area started to emerge –initially among practitioners– in the early 2000s (Brodie *et al.*, 2011). Academic interest followed, and the topic area became apparent in marketing literature around 2005, and in the next years, closer to 2010, literature focusing specifically on customer engagement began to emerge (Jaakkola, Conduit & Fehrer, 2018). Nowadays, engagement has become a central concept for both marketing theory and practice (Kumar & Pansari, 2016; Jaakkola, Conduit & Fehrer, 2018).

According to Jaakkola, Conduit and Fehrer (2018), research on customer engagement can be grouped into three phases. Literature published during the first phase, roughly between 2009 and 2011, was focused on identifying and providing a theory-based conceptualisation for the concept (Jaakkola, Conduit & Fehrer, 2018). Work in this phase was largely conceptual, with a focus on engagement behaviours (e.g. van Doorn *et al.*, 2010; Kumar *et al.*, 2010) or engagement as a psychological state (e.g. Bowden, 2009; Hollebeek, 2011). Notably, Brodie *et al.* (2011) through the development of five fundamental propositions, proposed a general definition for customer engagement (see Table 3.1). Subsequently, the second phase focused on the establishment of empirically refined conceptualisations, nomological network and measures for customer engagement with aims to operationalise the concept (Jaakkola, Conduit & Fehrer, 2018). For example, attention was given to both antecedents and outcomes of customer engagement (e.g. Vivek, Beatty & Morgan, 2012), development of scales (e.g. Vivek *et al.*, 2014) and the empirical examination of the three dimensions –emotional, cognitive and behavioural– proposed by Brodie *et al.* (2011) (Dessart, Veloutsou & Morgan-Thomas, 2015).

Around 2014, literature on engagement had grown substantially, and soon a split in the focus became observable (Jaakkola, Conduit & Fehrer, 2018). Two streams, one viewing engagement as a midrange theory for customer management (e.g. Kumar & Pansari, 2016) and the other, focused on the development of customer engagement as a midrange theory for understanding value co-creation in service ecosystems (Jaakkola & Alexander, 2014; Brodie, Hollebeek & Conduit, 2016; Storbacka *et al.*, 2016; Hollebeek, Srivastava & Chen, 2019) emerged. In fact, Jaakkola, Conduit and Fehrer (2018) note how the latter research stream has gained popularity, and within recent literature, a general shift from researching individually based engagement to researching actor engagement in service ecosystems can be observed.

Actor engagement is perceived to stem from the interactions between multiple, rather than dyadic, interactions on various interconnected platforms in a wider service ecosystem (Storbacka *et al.*, 2016; Alexander, Jaakkola & Hollebeek, 2018;

Jaakkola, Conduit & Fehrer, 2018). It represents an emerging research stream that addresses the need for the conceptual broadening of customer engagement to include a variety of actors and actor roles, drawing on their network relationships in a service ecosystem, rather than focusing on merely customers or the firm-customer relationships (Vargo & Lusch, 2011; Brodie *et al.*, 2019). Therefore, besides the buyers and sellers directly involved in a transaction, other actors in the service system can include for example non-profit organisations or governments (Jaakkola & Alexander, 2014). Moreover, while existing research has primarily adopted a micro-level perspective, zooming out to include the institutional context can enhance the understanding of engaged actors and their role in the service ecosystem (Alexander, Jaakkola & Hollebeek, 2018).

Storbacka *et al.* (2016) expand the notion of an actor by considering machines and technologies in addition to humans and collections of humans including organisations. This extension provides a window for researching technology-enabled engagement in various contexts, which is of high relevance in our increasingly digital environment, where technologies such as machine learning or augmented reality have an impact on the actor-to-actor interaction as well as the entire service experience (Storbacka *et al.*, 2016). This broadened scope of actor engagement enables research to raise questions related to the role of humans in actor-to-actor interactions, and how these interactions are affected if humans are substituted with technology, for example with automation. Besides technology acting as a facilitator for engagement, technological solutions can additionally act as engagement platforms, which in turn provide the opportunity for actor engagement (Storbacka *et al.*, 2016). Similarly, Brodie *et al.* (2019) and Blasco-Arcas *et al.*, (2020) acknowledge the importance of engagement platforms in connecting actors in service ecosystems.

While most research on engagement has been carried out in consumer settings, engagement research in B2B environments has recently started gaining traction (Pöyry *et al.*, 2020). For example, Reinartz and Berkmann (2018) argue how the key characteristics of business markets, including the derived character of demand, complex multi-person buying processes, high degree of interactions, formalisation of the exchange and the smaller number of players, impact the way engagement should be assessed. Thus, they propose how in B2B settings, engagement should be considered within a broader context of an organisation's network and consequently, the concept of customer engagement should be extended to partner engagement (Reinartz & Berkmann, 2018), stakeholder engagement (Jonas *et al.*, 2018), or more recently, to business actor engagement (Ekman *et al.*, 2021).

Nevertheless, Kleinaltenkamp *et al.* (2019) point out how Brodie *et al.* (2019) study focused only on an individual actor level, which they argue, is conceptually inadequate for addressing the B2B field due to its multi-actor nature. Therefore, for addressing actor engagement particularly in a B2B setting, Kleinaltenkamp *et al.* (2019) introduce the concept of collective engagement, which extends the scope of actor engagement to consist of various interactions and collaborations of individual actors, therefore taking into account collective-level considerations in organisations, for example, considerations made by the organisation's buying centre. Hence, through the introduction of levels –individual and collective– both researchers and managers can gain a deeper understanding of actor engagement, especially regarding the complex interactions within and across organisations in a service ecosystem.

The above discussion illustrates how in marketing literature, engagement has been conceptualised in various ways. Similarly, outside academia, practitioners have also been noted to have different perspectives on engagement. For example, in the 2022-2024 research priorities, the Marketing Science Institute (2022, p.7) acknowledges how the term engagement is used in different ways, *"sometimes for momentary attention or longer-term involvement in a brand or a category, or for mental availability or ability to generate emotional responses"*. Nonetheless, Lim *et al.* (2022) note how this lack of consensus should not necessarily be treated as problematic but instead, engagement can be treated as a highly encompassing concept that can accommodate diverse perspectives. However, for research, the operationalisation of the concept should be specific to the research aim and scope (Lim *et al.*, 2022).

Therefore, this thesis will consider engagement through the lens of actor engagement (Brodie et al., 2019), focusing on online engagement behaviours (e.g. Perez-Vega et al., 2021), among both prospective and current customers. The consideration of engagement among prospective customers is significant, as while some authors, including van Doorn *et al.*, 2010, Vivek, Beatty & Morgan (2012) and Lim *et al.* (2022) have recognised engagement among potential customers, extant research has largely focused on engagement that occurs post-purchase (e.g., Lemon & Verhoef, 2016; Pansari & Kumar, 2017). Thus, currently, insights into the dynamics of engagement with prospects remain limited.

Before providing more insights into the versatile literature on engagement, the following table (Table 3.1) provides a summary of the definitions of engagement discussed in this section. Next, this chapter will turn to examine the antecedents of engagement, followed by a discussion on engagement behaviours and outcomes of engagement.

Table 3.1. Definitions of engagement

Author(s), year and page	**Conceptualisation of engagement**	**Definition of engagement**
Bowden (2009, p. 65)	Customer engagement as a process	"The term engagement is conceptualised in this paper as a psychological process that models the underlying mechanisms by which customer loyalty forms for new customers of a service brand as well as the mechanisms by which loyalty may be maintained for repeat purchase customers of a service brand."
van Doorn *et al.* (2010, p.254)	Customer engagement as a behavioural manifestation	"Customer engagement behaviours go beyond transactions and may be specifically defined as a customer's behavioural manifestations that have a brand or firm focus, beyond purchase, resulting from motivational drivers."

Brodie *et al.* (2011, p.260)	Customer engagement as a psychological state	"Customer engagement (CE) is a psychological state that occurs by virtue of interactive, co-creative customer experiences with a focal agent/object (e.g., a brand) in focal service relationships. It occurs under a specific set of context-dependent conditions generating differing CE levels; and exists as a dynamic, iterative process within service relationships that cocreate value. CE plays a central role in a nomological network governing service relationships in which other relational concepts (e.g., involvement, loyalty) are antecedents and/or consequences in iterative CE processes. It is a multidimensional concept subject to a context- and/or stakeholder-specific expression of relevant cognitive, emotional and/or behavioral dimensions."
Storbacka *et al.* (2016, p.3008)	Actor engagement as a disposition and an activity	"Actor engagement is defined as both the actor's disposition to engage, and the activity of engaging in an interactive process of resource integration within a service ecosystem."
Jonas *et al.* (2018, p.402)	Stakeholder engagement	"…stakeholder engagement is defined here as a psychological state that occurs by virtue of stakeholder experiences throughout an interactive process within a specific service ecosystem."
Brodie *et al.* (2019, p.174)	Actor engagement as a disposition	"This theorising process led us to define AE [actor engagement] as a dynamic and iterative process that reflects actors' dispositions to invest resources in their interactions with other connected actors in a service system."
Kleinaltenkamp *et al.* (2019, p.12)	Collective Engagement	"…collective engagement refers to multiple actors' shared cognitive, emotional, and behavioral dispositions, as manifested in their interactive efforts devoted to a focal object."
Lim *et al.* (2022, p. 441)	Customer engagement	"…the concept of CE [customer engagement] can encompass cognitive, affective, and behavioral engagement among current and potential internal and external customers in multi-channel and multi-touchpoint offline and online environments across industries and sectors."

3.3. Antecedents of customer engagement

Existing literature has described numerous antecedents of customer engagement. In their systematic review, Ng, Sweeney and Plewa (2020) describe three categories of antecedents, customer capabilities –referring to the knowledge and skill of the focal actor, situational factors –including perceived fairness and service convenience– and attitudinal factors –which relate to the focal actors feeling and attitudes about the engagement object. Within attitudinal factors, trust, customer satisfaction and commitment have been acknowledged as significant drivers among repeat customers, although due to their cyclical nature, these factors can also be regarded as both antecedents and outcomes of customer engagement (Jaakkola & Alexander, 2014; Ng, Sweeney & Plewa, 2020). Similar findings have been reported in B2B settings, where trust and satisfaction have been reported as both antecedents and outcomes of engagement-related activities such as referrals, searching for information and participation in product development (Marcos-Cuevas *et al.*, 2016; Brodie *et al.*, 2019). Besides satisfaction, Pansari and Kumar (2017) describe emotion as an important antecedent of engagement.

In addition to the factors described above, van Doorn *et al.* (2010) propose customer goals, customer resources and perceptions of value as drivers of customer engagement behaviours. Moreover, Brodie *et al.* (2011) as describe participation and involvement as required antecedents, while flow and rapport are noted as potential antecedents in certain contexts. Notably, while a large portion of research has focused on assessing existing customers, Vivek, Beatty and Morgan (2012) and Vivek *et al.* (2014) acknowledge participation and involvement of both potential and current customers as antecedents for customer engagement. Similarly, focused on the context of social media, Harrigan *et al.* (2017) illustrate involvement as a key antecedent of customer engagement with brands.

In turn, Hollebeek and Chen (2014) proposed antecedents that relate to the customer's experience of the organisation or the brand, including brand quality and performance, delivery, promise, responsiveness, innovativeness as well as brand value. Similarly, Dessart, Veloutsou and Morgan-Thomas (2015) described brand-related drivers –including brand identification, brand satisfaction and brand trust–, social drivers (online brand community identification) and community value (including information, entertainment, networking and monetary incentives) in the context of antecedents of engagement in online brand communities.

In an empirical case study exploring antecedents of stakeholder engagement in innovation, Jonas *et al.* (2018) suggest eight antecedents that were categorised according to the micro-foundations of cognitive, emotional and behavioural dimensions of engagement. Antecedents under the cognitive dimension included self-representation, resource-dependence and the individual's hierarchical position in the service ecosystem, while friendship and trust were described as antecedents in the emotional dimension (Jonas *et al.*, 2018). For the behavioural dimension, antecedents of stakeholder engagement included perception of a common goal and institutional arrangements including shared rules and norms, which asserts that antecedents can both be relevant on an individual level but also apply across organisational boundaries (Jonas *et al.*, 2018). The role of institutional arrangements has also been discussed by Alexander, Jaakkola and Hollebeek (2018) in the context of actor engagement, as well as by Kleinaltenkamp *et al.* (2019), who focused on collective engagement.

The discussion above emphasises the fragmented nature of customer engagement literature, as antecedents of engagement can be seen to be determined by the context of the study. Moreover, the antecedents have also been noted to depend on the type of the customer –new or existing– affecting whether certain factors are seen as antecedents or outcomes (Ng, Sweeney & Plewa, 2020). Moreover, while extant work has acknowledged non-customers, such as potential customers (e.g. Vivek, Beatty & Morgan, 2012 and Vivek *et al.*, 2014), insights into the way engagement forms prior to the purchase remain scarce. For example, increased participation and involvement (Brodie *et al.*, 2011) may signal heightened interest and subsequently increased likelihood of making a purchase, both among prospective and current customers. Thus the association between antecedents of engagement and purchase, especially among prospective customers, warrants further exploration.

Furthermore, it should be noted how this discussion has focused entirely on customer-led antecedents. Organisation-led antecedents of customer engagement include customer relationship management activities, described in the previous chapter, as well as customer engagement marketing initiatives (Ng, Sweeney & Plewa, 2020), addressed later in this chapter. As this thesis is focused on exploring online engagement behaviours, the behavioural manifestations examined in extant literature are addressed next, after which the outcomes of engagement are discussed.

3.4. Engagement behaviours

Behavioural engagement refers to the voluntary resource contributions made by the actor, such as time, effort and information, that go beyond what is required for the transaction (van Doorn *et al.*, 2010; Jaakkola & Alexander, 2014; Jaakkola & Aarikka-Stenroos, 2019). Such manifestations of engagement have received notable interest among both researchers and practitioners as behaviours such as word-of-mouth, information sharing, and writing reviews online can easily be observed and hence measured (Ng, Sweeney & Plewa, 2020). Moreover, research has largely considered engagement behaviours that relate to communications about the brand or organisation, or involvement with product development or innovation (Jaakkola & Alexander, 2014).

For example, van Doorn *et al.* (2010) propose a range of customer engagement behaviours that relate to specific activities, including word-of-mouth communication, recommendations and other customer-to-customer interactions, blogging, writing reviews and participating in legal action (van Doorn *et al.*, 2010). Additionally, Jaakkola and Alexander (2014) build on this knowledge by exploring behavioural manifestations of customer engagement at a service system level. In particular, Jaakkola and Alexander (2014) recognise how these engagement behaviours can be divided into four categories: augmenting behaviours, co-developing behaviours, influencing behaviours and mobilising behaviours. Augmenting behaviours refer to customers employing resources to extend or add to the organisation’s offering, while co-developing behaviours relate to customers proposing resources such as ideas, to improve the organisation’s offering (Jaakkola & Alexander, 2014). In turn, influencing behaviours, such as referrals, encompass customer efforts to affect the perceptions of others towards the organisation, while mobilising behaviours refer to customer efforts to get other actors to take action (Jaakkola & Alexander, 2014).

From the aforementioned categories, the significance of influencing behaviours in B2B environments should be highlighted. Specifically, behaviours related to referencing have been recognised as a noteworthy manifestation of actor engagement (Jaakkola & Aarikka-Stenroos, 2019). Customer referencing is viewed to affect value creation for all actors involved in the reference triad, which constitutes of the seller, the reference customer and the prospective customer (Jaakkola & Aarikka-Stenroos, 2019). In their study, Jaakkola and Aarikka-Stenroos (2019) show how customer referencing either enhances or impairs the internal processes of the individual actors, which in turn either strengthens or damages the relationships between the actors in the triad, as well as facilitates exchange in the wider business network, through impacting the actor's position and business practice.

Furthermore, the online environment provides a particularly suitable environment for researching engagement behaviours, and hence various studies have assessed customer engagement online (e.g. Hollebeek & Macky, 2019; Leek, Houghton & Canning, 2019; Taiminen & Ranaweera; 2019). Especially social media technologies are acknowledged to have great potential for fostering customer engagement initiatives (Choudhury & Harrigan, 2014; Harrigan *et al.*, 2017), and likes, shares and comments have been considered as manifestations of behavioural engagement (e.g. Solem & Pedersen, 2016; Leek, Houghton & Canning, 2019). However, when assessing technology-aided engagement, such as engagement on social media, Pöyry *et al.* (2020) encourage to consider the object of engagement, and therefore, whether these actions reflect engagement with the technology or tool, rather than with the brand. Nevertheless, metrics such as likes, comments and shares, can provide organisations valuable insights on types of digital content that resonates with the organisation's audience, consequently enabling the organisation to customise their online content to foster online interactions, and subsequently engagement (Hollebeek & Macky, 2019; Taiminen & Ranaweera, 2019).

In the landscape of rapidly advancing technology, online engagement behaviours represent an emerging area for research. For example, Perez-Vega *et al.* (2021) emphasise the need for future research to advance our understanding of ways AI-enabled customised responses can impact outcomes identified from other forms of engagement. Moreover, they note how future exploration will enhance our ability to propose ways to enhance online engagement behaviours (Perez-Vega *et al.*, 2021). Additionally, in the context of social media in industrial marketing, McGrath, O'Toole and Drummond (2023) call for further exploration of the role of autonomous or non-human actors. Similarly, Hollebeek, Sprott and Brady, (2021) describe our understanding of customer engagement in automated service interactions as nascent. Thus, the selected focus for this thesis on online engagement behaviours in automated settings remains a timely area of investigation. Next, to provide further justification for the significance of the topic, the outcomes of engagement are discussed.

3.5. Outcomes of customer engagement

Focusing on customers, extant literature has reported various outcomes of engagement, including loyalty (Vivek, Beatty & Morgan, 2012; Vivek *et al.*, 2014; Dessart, Veloutsou & Morgan-Thomas, 2015; Harrigan *et al.*, 2017; Jaakkola, Conduit & Fehrer, 2018), commitment (Vivek, Beatty & Morgan, 2012; Brodie *et al.*, 2013; Jaakkola, Conduit & Fehrer, 2018), advocacy (Vivek *et al.*, 2014), brand connection (Hollebeek & Chen, 2014; Jaakkola, Conduit & Fehrer, 2018) word-of-mouth (Vivek, Beatty & Morgan, 2012; Vivek *et al.*, 2014; Jaakkola, Conduit & Fehrer, 2018) and again, satisfaction (Harrigan *et al.*, 2017; Fehrer *et al.*, 2018) and trust (Vivek, Beatty & Morgan, 2012).

For an organisation, the benefits of having engaged customers include improved performance and profitability, sales growth and acquirement of a competitive advantage (Brodie *et al.*, 2011). Moreover, Pansari and Kumar (2017) through a conceptual framework describe customer engagement as involving both direct and indirect contributions to the organisation by the customer. Direct contributions refer to customer purchases, while indirect contributions include referrals, influencing behaviour and customer feedback (Pansari & Kumar, 2017). Building on this, the benefits of customer engagement are divided into two categories, tangible and intangible outcomes, where tangible outcomes refer to firm performance (profits, revenue and market share) and intangible benefits include customer privacy sharing, permission marketing and thus more relevant marketing for the customer (Pansari & Kumar, 2017).

In addition to various beneficial outcomes, Hollebeek and Chen (2014) draw attention to the potential unfavourable consequences of engagement. By specifically addressing brand engagement, they anticipated that negative engagement could occur as a consequence of a trigger or an unfavourable experience with the brand (Hollebeek & Chen, 2014). Nevertheless, Heinonen (2018) points out how their analysis was lacking emphasis on factors that weaken engagement. Indeed, existing literature has largely focused on engagement as both an active and positively valenced concept and studies exploring negatively valenced engagement remain scarce (Heinonen, 2018; Ng, Sweeney & Plewa, 2020).

While not directly an outcome, the valence and intensity of engagement can impact the outcomes of engagement, making it a factor worthy of consideration. The valence can be either positive or negative, and the intensity of engagement can be thought of as a continuum, ranging from non-engaged to highly engaged (Brodie *et al.*, 2011). At the low end of the continuum, non-engagement refers to the absence of interaction or interactive experience with the organisation (Brodie *et al.*, 2011). Related to this, Brodie *et al.* (2013) describe states of temporary dormancy, where customers previously actively engaged are now passive and inactive. Subsequently, Ng, Sweeney and Plewa (2020) discuss passive engagement, which describes a situation where the customer may passively engage with the engagement object, such as through social media likes. Furthermore, disengagement refers to permanent termination of the customer's engagement with the engagement object (Brodie *et al.*, 2013). These states of engagement described above are characterised under negative outcomes of engagement as both negative valence and low intensity may act as barriers preventing the organisation from capturing the positive outcomes of customer engagement described previously.

Overall, despite the different scholarly approaches to engagement, the end goal of persuading customers to carry out desired expressions –such as positive attitudes towards the brand, purchases and loyalty– is generally agreed on (Lim *et al.*, 2022). Moreover, the relational outcomes have been emphasised, thus highlighting the potential of engagement initiatives in allowing customers to influence others, especially in the online environment (Vivek *et al.*, 2014). Nevertheless, as suggested in earlier sections of this chapter, extant work has largely focused on customers, and while non-customers have been acknowledged (e.g. Vivek, Beatty & Morgan, 2012; Vivek *et al.*, 2014) the outcomes of engagement for non-customers, such as those yet to purchase, represent a current gap in our understanding.

After addressing engagement largely from the customer's standpoint, this chapter will proceed to explore engagement from another angle, specifically that of the organisation. To address this perspective, a discussion on engagement marketing is presented next.

3.6. Engagement marketing

The increased attention on customer engagement amongst both academia and industry has motivated companies to employ marketing strategies that aim to drive engagement, and consequently lead to an improved business performance (Harmeling *et al.*, 2017). Indeed, Kumar and Pansari (2016) have demonstrated how through implementing relevant strategies, organisations can improve their levels of engagement with their customers. This is particularly relevant in business settings, where the nature of engagement has been described as more purposeful and hence outcome-oriented creating a contrast to a business-to-consumer or consumer-to-consumer setting where engagement has been suggested to emerge more organically (Marcos-Cuevas *et al.*, 2016; Blasco-Arcas *et al.*, 2020). Thus, by employing strategic initiatives to initiate engagement, organisations aim to proactively manage the customer experience (Alvarez-Milán *et al.*, 2018).

Harmeling *et al*. (2017, p.317) define engagement marketing as *"a firm's deliberate effort to motivate, empower and measure a customer's voluntary contribution to the firm's marketing functions beyond the core, economic transaction"*. In their study, they differentiate engagement marketing from other marketing strategies and propose a framework that illustrates how engagement marketing, and its two types –task-based and experiential– can foster long-term customer engagement (Harmeling *et al.*, 2017). Task-based customer engagement marketing includes initiatives where customers are asked to invest resources to complete structured tasks, such as composing a review, and they typically involve an incentive, such as a discount (Harmeling *et al.*, 2017). In turn, experiential customer engagement marketing initiatives make use of experiential events to foster both psychological and emotional bonds between the customer and the organisation, brand, or other customers (Harmeling *et al.*, 2017).

Moreover, Harmeling *et al.* (2017) emphasise the importance of encouraging customers' active participation as a primary engagement marketing objective. Thus, initiatives should be designed to motivate interactions outside the core economic transaction (Harmeling, Moffett & Palmatier, 2018). When designing these initiatives, Harmeling, Moffett and Palmatier (2018) draw attention to both organisational efforts to facilitate (e.g. through tools and engagement platforms), incentivise (e.g. rewards) and capture (e.g. through engagement data) the value from these interactions. Additionally, effective deployment of engagement marketing initiatives requires careful consideration of both targeting and timing (Harmeling, Moffett & Palmatier, 2018).

Overall, extant literature has identified various benefits and drawbacks for engagement marketing initiatives. The benefits of employing engagement marketing strategies have been described to include reduced customer acquisition costs, the promotion of customer-centric product innovations, more accurate measurement of customer value, improved quality of post-purchase service, enhanced customer satisfaction and loyalty, and the ability to build a more holistic understanding of the customer (Harmeling *et al.*, 2017). Nevertheless, Beckers, Doorn and Verhoef (2018) draw attention to potential downsides, such as the threat of negative word of mouth and consequent reputational damage. After all, the loss of control associated with the empowerment and amplification of customer voice in engagement marketing activities may create vulnerabilities for the organisation (Harmeling, Moffett & Palmatier, 2018). Despite this, Beckers, Doorn and Verhoef (2018) posit how the characteristics often associated with B2B markets, such as higher customer loyalty, make it a particularly suitable context for organisational engagement marketing initiatives (Beckers, Doorn & Verhoef, 2018).

Regarding appropriate contexts, the digital landscape presents a highly compelling domain for engagement marketing. Recent studies have acknowledged the role digital content plays in advancing brand engagement (Hollebeek & Macky, 2019; Taiminen & Ranaweera, 2019). In fact, it has been argued that online customer engagement occurs always through some digital content (Brodie *et al.*, 2013; Taiminen & Ranaweera, 2019). This creates opportunities for marketers to design initiatives that utilise digital content in influencing online engagement. For example, Meire *et al.*, (2019) demonstrate how marketers can influence the sentiment of customer's engagement on social media through marketer-generated content. Additionally, Taiminen and Ranaweera (2019) draw attention to the perceived helpfulness in organisation-generated digital content as a means to drive engagement.

Moreover, the online environment presents significant opportunities for measuring engagement due to marketers' ability to capture insights into the actions of prospects and customers online. Crucially, a comprehensive understanding of the underlying customer motivations to engage is a vital element of a successful engagement marketing strategy (Venkatesan, 2017). By acquiring such insights, organisations can effectively tailor their approaches to meet individual customer preferences. Indeed, personalisation is recognised as a key element of engagement marketing (Harmeling, Moffett & Palmatier, 2018), and organisations that have the ability to create and deliver personalised experiences enhance their success in implementing such strategies (Venkatesan, 2017). Additionally, as customer relationships evolve through different states (such as acquisition or retention), engagement marketing strategies should be tailored to the customer lifecycle (Venkatesan, 2017; Bleier, De Keyser & Verleye, 2018).

Furthermore, the potential of emerging technologies, including AI and automation, hold promise in delivering highly personalised experiences that enhanced customer engagement (Kumar *et al.*, 2019). The integration of AI-powered systems can enable organisations to capture and analyse vast amounts of data to identify patterns, for example from previous customer interactions, to dynamically adapt their engagement marketing tactics to align with individual customer preferences (Kumar *et al.*, 2019). Consequently, organisations are increasingly employing analytical tools that incorporate new metrics and data to monitor engagement (Grossberg, 2015b). This highlights the growing importance of understanding the role and effectiveness of technologies and tools in implementing engagement marketing strategies, thus offering a promising area for future research (Harmeling *et al.*, 2017).

3.7. Summary of research gaps

Chapter 2 acknowledged the incomplete nature of current knowledge on the impact of digitalisation on B2B relationships (Hofacker et al., 2019). Moreover, the chapter highlighted the influence of digitalisation on customer journeys and the consequential role played by emerging technologies, including AI and automation, in the management and cultivation of customer relationships in complex B2B settings. Further research is needed to elucidate both the implications and the effectiveness of the use of automation on B2B relationships in today's increasingly digital business environments.

In turn, the current chapter (Chapter 3) has highlighted how organisations are increasingly interested in novel approaches to establish meaningful and enduring connections with their audiences, thus positioning engagement as a crucial consideration (Wiersema, 2013; Kumar & Pansari, 2016; Blasco-Arcas et al., 2022). Consequently, engagement marketing strategies have been identified as an emerging area of organisational interest (Harmeling et al., 2017). In the online setting, digital content marketing efforts are noted to foster connections, (Järvinen & Taiminen, 2016; Harmeling et al., 2017; Hollebeek & Macky, 2019; Taiminen & Ranaweera, 2019), and consequently customer engagement (Mansour & Barandas, 2017; Wang et al., 2019; Hollebeek & Macky, 2019), however, the role of marketing automation in this process remains ambiguous. Therefore, the literature reviewed reveals an important gap in our understanding of the ways marketing automation can contribute to engagement in business settings.

3.8. Chapter summary

This chapter commenced by introducing engagement and acknowledging how the concept has in recent years become one of the key concepts in marketing literature (Kumar & Pansari, 2016; Jaakkola, Conduit & Fehrer, 2018). The conceptualisation of engagement in marketing literature was noted to have progressed from a narrow to a broader focus, transitioning the discussion from concentrating solely on customers to encompassing a range of actors in the service ecosystem (Storbacka *et al.*, 2016; Alexander, Jaakkola & Hollebeek, 2018; Jaakkola, Conduit & Fehrer, 2018). Consequently, this thesis will consider engagement through the lens of actor engagement (Brodie *et al.*, 2019), specifically focusing on online engagement behaviours exhibited by both prospective and current customers.

After describing the various conceptualisations of engagement, the chapter proceeded to discuss several antecedents of engagement identified in extant marketing literature. Examples of antecedents include attitudinal factors such as trust and satisfaction (Jaakkola & Alexander, 2014; Marcos-Cuevas *et al.*, 2016; Brodie *et al.*, 2019; Ng, Sweeney & Plewa, 2020) as well as participation and involvement (Brodie *et al.*, 2011; Vivek, Beatty & Morgan, 2012; Vivek *et al.*, 2014). Following this, engagement behaviours were addressed. Notable behaviours included word-of-mouth and other customer-to-customer communications, blogging, writing reviews (van Doorn *et al.*, 2010), and particularly in B2B settings, referrals (Jaakkola & Aarikka-Stenroos, 2019). Moreover, attention was given to engagement behaviours online, such as interactions on social media (Choudhury & Harrigan, 2014; Harrigan *et al.*, 2017), highlighting the research opportunities that arise from studying these behaviours within the context of emerging technologies, such as AI and automation (Hollebeek, Sprott & Brady, 2021; Perez-Vega *et al.*, 2021).

Following this, the outcomes of engagement, for both customers and the organisation, were thoroughly discussed. This discussion revealed the diverse range of effects, such as commitment and loyalty (Vivek, Beatty & Morgan, 2012; Jaakkola, Conduit & Fehrer, 2018), purchases (Pansari & Kumar, 2017), and improved firm performance (Brodie *et al.*, 2011; Pansari & Kumar, 2017) engagement can yield. However, it became apparent that extant marketing literature has primarily focused on engagement with existing customers, and while prospective customers have been mentioned (e.g. van Doorn *et al.*, 2010; Vivek, Beatty & Morgan, 2012; Vivek *et al.*, 2014; Lim *et al.*, 2022), limited attention has been given to the nature of engagement with those yet to buy, underscoring the need for further investigation into engagement across the customer journey.

Subsequently, the chapter proceeded to discuss engagement from the organisation's perspective. This section considered deliberate organisational efforts to foster engagement, known as engagement marketing strategies (Harmeling *et al.*, 2017). Moreover, in discussing engagement marketing strategies, this section highlighted the utilisation of digital channels and emerging technologies as powerful tools for fostering online engagement. From this discussion, two important questions emerge: If online engagement online always occurs through digital content (Brodie *et al.*, 2013; Taiminen & Ranaweera, 2019), what does this mean for technologies such as marketing automation that can improve both the efficiency and effectiveness of digital content marketing initiatives? Can such technology drive the effectiveness of an organisation's engagement marketing strategies? There remain several aspects of the intersection of digital content marketing and engagement marketing about which relatively little is yet known, especially in today's business settings. These gaps were summarised in section 3.7, which synthesised insights from both Chapter 2 and Chapter 3.

Overall, this chapter offers comprehensive insights into engagement in B2B marketing, covering its conceptualisations, antecedents, engagement behaviours, outcomes, and engagement marketing strategies. It also highlights areas for future research and underscores the significance of studying engagement beyond existing customers. These insights serve as a valuable foundation for further exploration of online engagement across contemporary B2B customer journeys. Thus, building on these insights, the next chapter will address the methodological considerations necessary to ascertain the most suitable research design used to explore B2B online engagement behaviours in today's automation-enhanced settings.

4. Methodology

4.1. Chapter introduction

After developing a comprehensive understanding of B2B customer relationships and engagement through the review of extant marketing literature in the previous chapters, this thesis will now move to describe the methodological considerations. In this chapter, a discussion around the chosen methodology, linked with the underlying theoretical assumptions is presented, after which a detailed description of how the research was both developed and conducted is provided. The aim of this chapter is not to provide an exhaustive list of research philosophies or methodologies but to highlight the path chosen for this study and justify the methodological choices made.

This chapter is structured the following way. Firstly, the research aim and objectives are reintroduced after which the philosophical considerations underpinning the research methodology are examined. After reviewing two opposite philosophical positions, positivism and interpretivism, the chosen philosophical position for this study is determined. This is followed by a description of the research approach, after which the research design is presented. After reviewing qualitative research methods, this chapter proceeds to discuss phenomenological interview strategy, which was selected as the research method for this study. Subsequently, sampling considerations are addressed, followed by a discussion on research ethics. Additionally, both the data collection and data analysis procedures are discussed, after which research quality in qualitative research is outlined. Lastly, a chapter conclusion is presented.

4.2. Research aim and objectives

The literature reviewed in the previous chapters revealed a gap in understanding with regard to the ways technologies, such as marketing automation, can be harnessed to foster online engagement in B2B settings. To address this gap in knowledge, this thesis focuses on exploring whether marketing automation can be utilised to foster B2B online engagement. This exploration will focus on the point of view of digital marketing managers working with marketing automation software in the B2B sector. The research aim is determined as follows:

"To explore the role of marketing automation in influencing online engagement behaviours in business-to-business settings"

Moreover, the research objectives for the study are presented below:

1. To explore the use of marketing automation in digital content marketing strategies targeted at B2B customer-company interactions.
2. To investigate how these online interactions fostered by marketing automation (potentially) influence B2B engagement behaviours.
3. To understand the extent marketing automation can support and advance a company's engagement marketing efforts online.

As illustrated above, this thesis will focus on three research objectives that together act as means for reaching the aim of the study. The first objective focuses on the online interactions between the organisation and its customers (including both prospective and current customers), that take place through digital content and are fostered by marketing automation. After developing an understanding of these automation-enhanced interactions, this thesis will then investigate whether these interactions can influence online engagement behaviours. Subsequently, the thesis will then determine ways in which organisations can use marketing automation to drive online engagement as a part of an organisation's engagement marketing strategy.

The research objectives discussed above have substantial implications for the chosen research methodology. Specifically, these objectives underscore the importance of adopting an exploratory approach to gain comprehensive insights into an emerging phenomenon: the use of marketing automation for B2B engagement marketing. Moreover, the focus on developing a detailed understanding suggests the use of methods that yield rich data. However, before proceeding to describe the research design, and subsequently the data collected, it is necessary to address the underlying philosophical considerations that shape the way this research is approached.

4.3. Research philosophy

According to Saunders, Lewis and Thornhill (2019, p. 130), research philosophy refers to the *"system of beliefs and assumptions about the development of knowledge"*. These philosophical presumptions, related to the understanding of reality and ways of knowing are embedded in the selection of research questions, research methods and the ways of analysing the findings (Deshpande, 1983; Hatch & Yanow, 2008). Therefore, considerations of research methodology entail considerations related to the underlying philosophical assumptions embedded in research methods (Hatch & Yanow, 2008). As these assumptions affect both the way research is carried out and the outcome, they should be clearly identified.

Burrell and Morgan (1979) present that researchers in social sciences approach the subject of their research with explicit or implicit assumptions relating to the nature of the social world and the ways it can be investigated. Firstly, researchers in social sciences make ontological assumptions, which focus on the nature of reality, and whether reality is external to the consciousness of the individual, or rather a product of it (Burrell & Morgan, 1979). In addition to ontological assumptions, researchers also make assumptions on the nature of knowledge and on what qualifies as knowledge, referred to as epistemological assumptions (Saunders et al., 2012). Consequently, epistemological assumptions also impact the way knowledge can be communicated to others (Burrell & Morgan, 1979). The abovementioned considerations also impact the methodological assumptions, focused on the ways social reality can be studied (Corbetta, 2003), as different ontological and epistemological perspectives will encourage different research methodologies (Burrell & Morgan, 1979). Furthermore, the considerations described above can be noted to be interrelated, as the conceptions of reality impact the ways reality can be understood, and subsequently the techniques available for developing an understanding of it (Corbetta, 2003).

The abovementioned ontological and epistemological questions can help indicate the type of fundamental assumptions the researcher makes about reality, and what paradigm the researcher finds to closest match their philosophical views. While paradigms can be noted to be a multidimensional concept, here Kuhn's definition is adopted, and a paradigm is defined as "a *set of linked assumptions about the world which is shared by a community of scientists investigating that world"* (cited in Deshpande, 1983, p.101). Moreover, business and management research is characterised by diversity in research paradigms, as the field has adopted philosophical positions from natural sciences, social sciences as well as arts and humanities (Saunders, Lewis & Thornhill, 2019).

These philosophical positions are often mapped on a continuum based on the objective-subjective dimension that describes the assumptions they hold about social research (Burrell & Morgan, 1979; Saunders, Lewis & Thornhill, 2019). With regard to ontology, objectivist assumptions hold reality to exist external to social actors, while epistemologically, knowledge is determined to have regularities, patterns and laws that are both observable and measurable (Cunliffe, 2010). At the other end of the continuum, subjective assumptions regard reality as imagined, and hence constructed from the perceptions and actions of humans, while knowledge is viewed as both personal and experiential (Cunliffe, 2010).

As a consequence, objectivist approaches to research often focus on actions, structures, behaviours, systems or processes, while subjectivist approaches to research often focus on the meanings people give to their surroundings, interactions, and the way individuals construct their world (Cunliffe, 2010). Therefore, to summarise, the choice of philosophical positioning affects the choice of methodology, as some methodological approaches are more attractive to some paradigmatic positions, as the underlying philosophical assumptions shape the theoretical and empirical arguments put forward, impacting the way these arguments hold when critically evaluated (Tadajewski, 2008).

As indicated in the chapter introduction, the purpose of this section is not to provide an exhaustive list of various philosophical positions or theoretical assumptions in marketing research but to provide a concise overview of how the underlying philosophical position directs the research methodology. Therefore, two opposing paradigms -positivism and interpretivism- both of which have been influential to the development of social sciences research (Corbetta, 2003) were chosen for closer examination.

4.3.1. Positivism

As a philosophical stance, positivism emphasises specific accepted approaches for producing knowledge, including objective observations and measurement of empirically defined variables. Positivist research, originating from the thinking of Francis Bacon and Auguste Comte, often looks up to the philosophical position of natural scientists (Saunders, Lewis & Thornhill, 2019). It highlights the need and ability to produce accurate knowledge based on hard facts, independent from subjective human interpretations (Saunders, Lewis & Thornhill, 2019). Accordingly, positivists assume reality to be detached from the researcher, and the social world to exist independently, similar to the natural world (Burrell & Morgan, 1979). With regard to the epistemological position, positivists argue *that "we know because of our abilities to sense phenomena"* (Deshpande, 1983, p.102). Hence, knowledge is observable and measurable, and the social world can be objectively understood by using the same methods for inquiry as used for studying the natural sciences (Corbetta, 2003). Moreover, positivism has not remained static over time, and today, numerous varieties of philosophical positions exist (Saunders, Lewis & Thornhill, 2019). In particular, during the twentieth century, a revised form of positivism, known as post-positivism emerged aiming to address the limitations of positivism through a more complex approach to social research which recognised reality as being imperfectly knowable, and hence expressing theories through probability, rather than deterministic laws (Corbetta, 2003). Nevertheless, the post-positivist school of thought retained the positivist assumptions including ontological realism, and the strong preference for empirical observation (Corbetta, 2003).

With regard to research methods, research adopting a positivist stance often emphasises quantifiable observations, such as online surveys or structured interviews that permit the data to be coded and categorised (Cunliffe, 2010; Saunders, Lewis & Thornhill, 2019). Additionally, researchers often prefer the exploration of causal relationships to generate law-like generalisations which could be used for explanation and prediction purposes (Saunders, Lewis & Thornhill, 2019). Moreover, theories are built by testing hypotheses and various propositions (Cunliffe, 2010). Hence, the emphasis is on quantification, structure, replicability and generalisability of research (Saunders, Lewis & Thornhill, 2019), all promoting the credibility that stems from the notion of scientific verifiability. Moreover, according to a positivist approach, research findings are inherently value-free and thus stripped from any presuppositions or prejudice revealing only the truth about the subject under exploration (Saunders, Lewis & Thornhill, 2019). Indeed, positivistic research positions involving methodological approaches informed by logical empiricism have been noted to dominate in research exploring customer relationship management (Möller, 2013), but also in the wider field of marketing (Deshpande, 1983; Dubois & Gibbert, 2010).

Nevertheless, a positivistic approach to research for this particular study can be experienced as constraining due to the positivist emphasis on quantifiable observations and statistical analysis (Saunders, Lewis & Thornhill, 2019). After all, the research questions put forward emphasise the development of an understanding of the lived experience of a phenomenon, which does not necessarily align with the search for law-like generalisations or even cause-effect relationships. Hence, an alternative philosophical position could be better suited for this study. To explore a more suitable philosophical position, let us now move to the other end of the objective-subjective continuum to discuss interpretivism, after which the chosen philosophical position for this study will be revealed.

4.3.2. Interpretivism

Interpretivism emerged from the criticism of the positivist paradigm (Saunders, Lewis & Thornhill, 2019) and approaches reality as socially and symbolically constructed (Saunders et al., 2009; Cunliffe, 2011). It is rooted in the German idealist tradition that proposed the notion of reality to be situated in the spirit or idea, rather than being found in data acquired by sense perception (Burrell & Morgan, 1979). In particular, interpretivist researchers argue that social reality and human action cannot be studied objectively, as doing so would overlook the individual dimension, – encompassing all things that differentiate the human world from the world of things (Corbetta, 2003). Additionally, interpretivists disagree with the positivist pursuit for reduction and the development of law-like generalisations, as they believe that the rich insights into humanity and the social world would be lost if the complexity was to be reduced in such a manner (Saunders, Lewis & Thornhill, 2019). The focus on deriving meanings from complex and rich data with multiple interpretations reveals how interpretivism entails a subjective approach to research (Saunders, Lewis & Thornhill, 2019). While the interpretivist position has developed to incorporate a wide range of both sociological and philosophical thought, the attempt to understand the social world from the perspective of the actors directly involved in the social process is at the core of the paradigm (Burrell & Morgan, 1979).

The interpretive position proposes a fundamental epistemological difference between social sciences and natural sciences by arguing that social reality cannot be observed, but instead, it has to be interpreted (Corbetta, 2003). Epistemologically, interpretivists acknowledge that individuals make sense of reality in different ways and therefore, subjective meanings drawn from social phenomena can motivate action (Saunders, Lewis & Thornhill, 2019). Hence, knowledge is both socially constructed and sustained (Burrell & Morgan, 1979). Moreover, interpretivism highlights the importance of acknowledging the social context from which meanings are derived and the processes utilised in the creation of these meanings (Hatch & Yanow, 2008). After all, both knowledge and its impact can only be understood with reference to its immediate social context (Burrell & Morgan, 1979). Additionally, emphasis is often placed on language, culture and history, as these factors affect the interpretations and experiences made of the social world (Saunders, Lewis & Thornhill, 2019). The overall purpose of interpretivist research can be described to be the development of novel rich understandings and interpretations of the social world and its contexts (Saunders, Lewis & Thornhill, 2019). In fact, the notion of understanding can be regarded as a defining characteristic of theories in the interpretative paradigm (Burrell & Morgan, 1979).

Within the interpretivist position, several strands of thought can be identified. For the purpose of this section, three strands –hermeneutics, phenomenology and symbolic interactionism– are outlined. Hermeneutics focuses on the study of cultural artefacts including language, arts, religion and institutions, which are viewed as the products of the human mind which characterise the social and cultural world (Burrell & Morgan, 1979). In turn, phenomenology, originating from the thinking of Husserl

(Inanc & Kozak, 2021), focuses on the existence and the research participants' lived experience, and consequently, the recollections and interpretations the participants hold of those experiences (Saunders, Lewis & Thornhill, 2019). Thirdly, symbolic interactionism focuses on the meanings that are derived from interaction, and therefore the focus lies in observation and the study of social interactions including meetings, conversations and teamwork (Saunders, Lewis & Thornhill, 2019). The three strands described above illustrate the contrasts in the focus of the research and the ways meanings are gathered, consequently affecting the research procedures and techniques utilised.

Interpretivist researchers argue that the fundamental differences between natural sciences and social sciences inevitably entail the use of different research methods (Corbetta, 2003). Interpretivists adopt a more flexible approach towards approved forms of knowledge, as unlike in positivism, interpretivists are accepting of forms of data that are hard to quantify, including for example values, intentions, thoughts and feelings (Corbetta, 2003). Consequently, research adopting an interpretivist position is often characterised by qualitative techniques and the use of small samples allowing for in-depth investigations (Saunders, Lewis & Thornhill, 2019). Moreover, the interaction between the research participant or object of study and the researcher during the research is regarded as the foundation for the cognitive process, rather than being negatively judged (Corbetta, 2003). Furthermore, a cornerstone of interpretivist research is the researcher's ability to adopt an empathetic stance, as the researcher aims to enter the research participant's social world to comprehend their point of view (Saunders, Lewis & Thornhill, 2019).

In contrast to positivist research, interpretivists often view a phenomenon as a unique combination of specific circumstances particular to that time and place (Saunders, Lewis & Thornhill, 2019), and thus research is not always intended to be replicated. Moreover, research generalisability is acquired in a different form to positivist research, as the typically small sample sizes typical to qualitative approaches limit the generalisability of research findings through statistical means (Saunders, Lewis & Thornhill, 2019). Hence, interpretivists focus on generalisability through theoretical abstraction where learning from one study can be applied in another setting leading to generalisations across other research settings (Saunders, Lewis & Thornhill, 2019). The following section will proceed to consider the research paradigm deemed most suitable for this thesis.

4.3.3. Chosen research paradigm

After reviewing various philosophical positions, the interpretivist position was experienced as most suitable for this research. The position aligns with the research aim and objectives, which focus on the generation of an understanding of the ways marketing automation can impact online engagement in B2B settings. As both B2B online engagement and marketing automation represent relatively new concepts in marketing literature, the gathering of detailed and rich insights was deemed as a suitable starting point for developing theory. Moreover, the interpretivist perspective can be noted to be suitable for research in business settings, as it accepts the perception that business situations are often both complex and unique, reliant on a set of circumstances and interaction (Saunders, Lewis & Thornhill, 2019). Thus, this study will be characterised by a subjective approach to research.

With regard to the various strands of interpretivism, the phenomenological position was regarded as most suitable for this study due to the focus on exploring the lived experience of the research participant. After all, this study will focus on the key informant's perspective on both the software tool as well as online engagement. Furthermore, the chosen philosophical position enables the study to explore aspects that can be perceived as difficult to quantify, such as interaction and engagement. As the underlying philosophical position guides the methodological approach, a qualitative approach to research was perceived as the most suitable approach. The next section will elaborate on this reasoning by describing the approach to theory development. However, before delving into the research approach, the following table (Table 4.1) presents a summary of the discussion on research philosophy presented in this chapter.

Table 4.1. Summary of the main differences between a positivist and an interpretivist philosophical position

	Positivism	**Interpretivism**	**This study**
Ontology	Reality is objective and exists external to social actors	Reality is subjective and is constructed of human interpretation	Reality is subjective and is constructed of human interpretation
Epistemology	Knowledge is both observable and measurable; researcher is independent to the research object	Knowledge is personal and experiential; researcher is interdependent to the research object	Knowledge is personal and experiential; researcher is interdependent to the research object
Purpose	Experimental science, Search of laws	Interpretative science, Search for meanings	Exploratory
Goal	Explanation	Understanding, comprehension	Develop an understanding of an emerging phenomenon
Approach to theory-building	Hypothesis testing, generalisation through statistical probability, deduction (where theory precedes observation)	Gathering of rich data and generating context-specific meanings, generalisation through theoretical abstraction, induction (where theory emerges from observation)	Gathering of rich data and generating context-specific meanings, generalisation through theoretical abstraction, induction (where theory emerges from observation)
Methodology	Typically quantitative techniques	Typically qualitative techniques	Phenomenological semi-structured in-depth interviews
Sampling considerations	Large sample sizes for credible statistical analysis	Small sample sizes for in-depth investigation	Sample consists of 29 experienced digital marketers utilising marketing automation in B2B setting

(Corbetta, 2003; Saunders, Lewis & Thornhill, 2019)

4.4. Research approach

The research approach refers to the overall strategy employed to fulfil the previously stated research aim and objectives. Firstly, this research can be noted to follow an exploratory purpose. This is indicated through the research aim and objectives that focus on the formation of an in-depth understanding of a new phenomenon; the use of marketing automation for B2B engagement marketing. Indeed, an exploratory study can be valuable for clarifying the understanding of a phenomenon or problem, especially when the precise nature of the issue in question is not yet clear (Saunders, Lewis & Thornhill, 2019). Thus, an exploratory study can be used as a tool to gain rich and detailed insights into the nature of the phenomena or problem investigated.

Moreover, an inductive approach to theory development can be noted to align with the underlying interpretive philosophical position (Corbetta, 2003). Adopting an inductive approach entails exploring a particular context in detail, identifying themes and patterns in data and using those findings to develop theory (Saunders, Lewis & Thornhill, 2019). Furthermore, Saunders et al. (2019) have suggested that when researching new topics, an inductive approach to theory development may be more appropriate, as it allows the researcher to reflect on the theoretical themes that emerge from the data.

Overall, both the exploratory purpose and the use of induction for developing theory suggest that a qualitative research strategy is most appropriate for this study. Before proceeding to discuss considerations related to qualitative research methods, the chosen research design will be described.

4.5. Research design

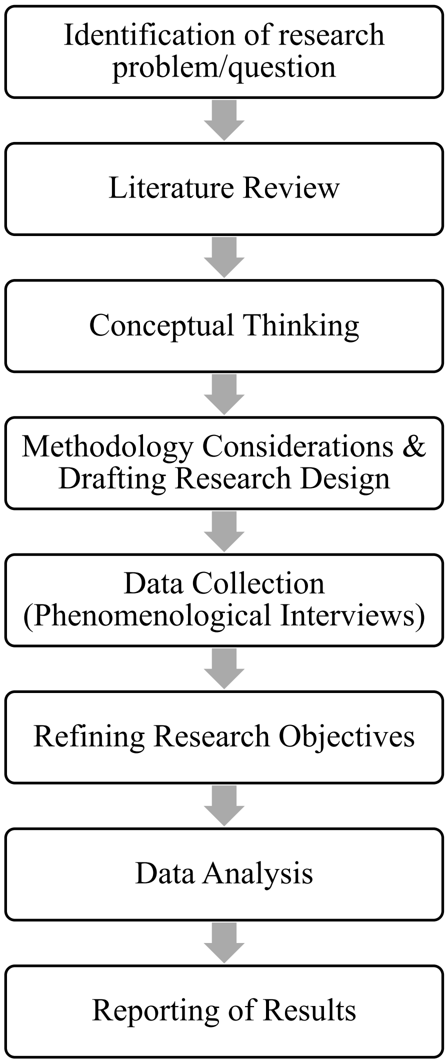
The purpose of a research design is to both explain and justify what data is to be collected, where from and in what ways, as well as describe how the data is analysed, and how will this process help saturate the aim of the research (Easterby-Smith, Thorpe & Jackson, 2008).

Quantitative and qualitative research designs can be noted to differ significantly, as in quantitative research the research design is highly structured and inflexible, as the design is drawn up before the data collection commences (Corbetta, 2003). In contrast, a qualitative research design is more unstructured and flexible, as the design is also shaped during the data collection period, allowing the researcher to explore the data and capture elements that were unforeseen (Corbetta, 2003). Thus, mapping qualitative research into stages can be difficult, as for example, the data collection and data analysis processes –which in quantitative research represent clear sequential stages– do not follow the same order in qualitative research, and instead, can overlap and intersect (Corbetta, 2003). Keeping this in mind, the section below provides a summary of the way the study was conducted. The proceeding sections will elaborate on each step and justify why this chosen approach was deemed most suitable for this study.

This research project has been approached the following way. First, existing literature on the topic area was carefully reviewed, which helped determine the overall aim and research objectives for the study. After reviewing existing literature on marketing automation and B2B customer engagement extensively, it was determined that the current literature was not sufficient in answering the set research objectives, and therefore primary research was required to reach the aim put forward for this study. Next, the research design was drafted, which also informed the chosen qualitative approach to research. After determining the research methodology, selected to consist of phenomenological in-depth interviews, data collection commenced. Following the data collection, the research objectives were revisited, and the data was analysed. Lastly, the results of the research were reported.

The described research design is also represented in Figure 4.1. Despite the linear graphic representation, it should be noted that this research design itself does not necessarily represent a linear process, and the different stages in the research design can overlap and be revisited at various points in time.

Figure 4.1. Illustration of the research design



4.6. Qualitative research methods

As the underlying philosophy guides the choice of methodology, qualitative research can be noted to adopt entirely different research techniques to quantitative research (Corbetta, 2003). After all, qualitative research is concerned with the meanings derived from participants and the relationships between them, consequently accepting a variety of data collection techniques and procedures for data analysis (Saunders, Lewis & Thornhill, 2019). Moreover, qualitative research is characterised by its open and interactive relationship between research and theory (Corbetta, 2003). Additionally, success is often reliant on the researcher's ability to gain both physical and cognitive access to the participants (Saunders, Lewis & Thornhill, 2019). Indeed, those who take part in the data collection process are treated as participants, rather than merely respondents (Saunders, Lewis & Thornhill, 2019) as both contact and interaction between the researcher and the participants are treated as prerequisites for comprehension (Corbetta, 2003).

In qualitative research, data can be collected in a variety of ways. According to Corbetta (2003), these methods can be grouped into three broad categories: direct observation, in-depth interviews and analysing documents. Firstly, observations are used to analyse a particular social situation by the researcher immersing themselves in it, to gain first-hand experience and give detailed descriptions of the situation (Corbetta, 2003). Observations are often linked with ethnographic approaches, which can entail direct participant observation, but also observations through other means such as through digital media (Easterby-Smith, Thorpe & Jackson, 2008). Secondly, interviews are used to collect data on the experiences, opinions and feelings of the research participants, in order to develop an understanding of their motivations and behaviour (Saunders, Lewis & Thornhill, 2019). Interviews involve collecting information through language, and hence meanings are derived from verbal expressions of the research participants (Easterby-Smith, Thorpe & Jackson, 2008). Thirdly, the use of documents usually entails the analysis of material produced by society through individuals and institutions, such as letters or news articles, to gain an understanding of a social situation (Corbetta, 2003).

Nevertheless, this grouping merely represents one of many, for example, Easterby-Smith, Thorpe and Jackson (2008) have grouped the main qualitative data collection methods into natural language data (e.g. in-depth interviews, group and focus interviews, diary methods, video recordings), ethnographic approaches (e.g. participant and non-participant observation, visual methods), and interactive methods (e.g. action research). Furthermore, researchers can utilise one technique, indicating a mono-method study, or multiple qualitative research techniques, known as a multi-method approach to research (Saunders, Lewis & Thornhill, 2019).

After assessing the various qualitative research methods available, adopting an interview strategy was experienced as most suitable for this study. Firstly, it was recognised that both B2B customer engagement and marketing automation are concepts that can be regarded as difficult to observe, ruling direct observations as an unsuitable method. While other ethnographic methods, especially internet-mediated observation through the form of online reviews were considered, such methods were perceived to only reveal one aspect of the phenomenon, and consequently unsuitable for saturating the aim of this study. After all, existing literature revealed how writing reviews and engaging in word-of-mouth can be recognised as only of many customer engagement behaviours. Moreover, the use of documents was also experienced as unsuitable for this study as both marketing automation and customer engagement represent relatively recent concepts, creating challenges related to the availability of material to analyse.

Consequently, conducting in-depth interviews was noted to align with the underlying phenomenological approach, as well as the exploratory purpose of the study, which supports the use of a semi-structured approach involving asking open-ended questions. The implications of selecting an exploratory qualitative research approach are described next in detail.

4.7. Exploratory phenomenological interviews

For this study, a phenomenological interview strategy was chosen as the methodological approach for data collection. After all, phenomenologists are concerned with people’s experience of a particular phenomenon and investigate the ways individuals derive meanings from these experiences (VanderStoep & Johnson, 2008). Thus, the focus is on gaining insights into human behaviour that arise from individual perceptions, experiences, or expectations (Inanc & Kozak, 2021). Subsequently, a phenomenological interview strategy involves the gathering of insights related to a phenomenon experienced by a set of people in a defined time and space. The data gathered from interviews is often both rich and descriptive (Saunders, Lewis & Thornhill, 2019), and therefore, offers a steady foundation for theory-building (Holliman & Rowley, 2014).

Interviews can be conducted in various ways, including one-to-one interviews or interviewing multiple interviewees at the same time, known as one-to-many interviews (Saunders, Lewis & Thornhill, 2019). Interviews can also be structured, semi-structured or unstructured, and the degree of structure, referring to the pre-determined layout of the interview, affects the flexibility of the researcher to adjust the interview questions based on the interviewee's responses (Saunders, Lewis & Thornhill, 2019). For the proposed study, semi-structured one-to-one interviews were deemed as the most suitable interview strategy, as the responsiveness related to conducting semi-structured interviews allows the researcher to gather valuable contextual material (Saunders, Lewis & Thornhill, 2019).

Semi-structured interviews typically involve the creation of an outline of topics to be covered during the interview, also known as an interview guide, but the specific order in which the topics are covered and the wording of the question asked can vary (Corbetta, 2003). This way the interviewer can ensure the flow of the conversation, but also ask for clarifications or explanations for answers that perhaps are not clear, or ask the participant to elaborate further, allowing the participant to describe their experiences in full (Corbetta, 2003). Therefore, conducting phenomenological semi-structured one-to-one interviews allows the researcher to gather insights related to the user perceptions of marketing automation, enabling the formation of a detailed understanding of the use of the tool in practice, and its potential for driving engagement online.

Nonetheless, to succeed with phenomenological research, the researcher must ensure that the sample consists of individuals who have experienced the same phenomenon (VanderStoep & Johnson, 2008), and for this study, interviewees must have an understanding of what is meant by marketing automation and how the digital marketing tool is utilised in the B2B sector. Therefore, for this study, only individuals who have prior experience with utilising marketing automation and employing content marketing strategies were invited to participate. Before proceeding to consider the sample for the study, it is necessary to consider the role of the interviewer in conducting semi-structured interviews.

4.7.1. Role of the interviewer

The role of the interviewer is central to the success of the qualitative interview (Saunders, Lewis & Thornhill, 2019). Reflexivity in qualitative research refers to the researcher's awareness of their own effects on the research process (Saunders, Lewis & Thornhill, 2023). It involves acknowledging and critically reflecting on how the researcher's beliefs, assumptions, and biases may shape the design and execution of the research (Saunders, Lewis & Thornhill, 2023). For this research, no significant issues of bias related to the researcher's background or beliefs were identified. Nevertheless, as an interview consists of more than simply recording information, and instead represents a process of social interaction during which meanings are constructed (Corbetta, 2003), the active role of the researcher is transparently highlighted. Thus, throughout the research, and especially during the interview process, the researcher maintained a critically reflective and reflexive approach.

To ensure success with qualitative interviews, various practices should be considered. For example, the importance of establishing personal contact (Saunders, Lewis & Thornhill, 2019) and establishing trust are regarded as important for the formation of an open relationship that benefits the interview process (Easterby-Smith, Thorpe & Jackson, 2008). Additionally, the interviewer has to guide the interview to direct the conversation on the established topics and ensure the interview is carried out according to the aims set for the research (Corbetta, 2003). The interviewer can utilise both open-ended questions as well as probing questions to gather a more detailed response from the participant. Especially probing can be used in situations where the aim is to get the research participant to build on a previous answer, adding both significance and depth to the data gathered (Saunders, Lewis & Thornhill, 2019). Moreover, the questions need to be phrased clearly to ensure that the participant understands the question, and the tone of voice should be kept neutral (Saunders, Lewis & Thornhill, 2019). Appropriate questioning will increase the reliability of the data gathered as well as reduce the scope for bias (Saunders, Lewis & Thornhill, 2019). Furthermore, the interviewer needs to demonstrate active listening skills by being reactive and empathetic towards the interview participant and allowing them to develop and express their responses (Saunders, Lewis & Thornhill, 2019).

Another key skill that should be mentioned is time management, as interview participants will have agreed to volunteer a part of their day to participate in the study, and their schedule should be respected. Moreover, the recording of the interview may also be included in the role of the interviewer. A recording of the interview presents an unbiased record of the conversation and is essential for accurate transcription, but also allows the researcher to go back and re-listen to interviews at a later time in order to spot elements that were at first missed (Easterby-Smith, Thorpe & Jackson, 2008). Nevertheless, participant permission to be recorded must be ensured in advance of the interview. This and other ethical considerations will be addressed in detail later in this chapter, in section 4.9. Next, the interview guide is presented.

4.7.2. Interview guide

As mentioned previously, semi-structured interviews typically involve a list of predetermined themes and potentially a few key questions related to the themes that guide the interview process (Saunders, Lewis & Thornhill, 2019). A summary of the interview guide for the current study is presented in Table 4.2, while the full table, illustrating the way both the research questions and the follow-up questions were derived from the overall research aim, can be found in Appendix II. As illustrated in the table, the questions were divided into the following predetermined themes: customer-company interactions, use of digital content marketing, use of marketing automation, perceptions of customer engagement, perceptions of the impact of marketing automation on online engagement, and finally, engagement marketing.

Additionally, the interview guide was adjusted slightly depending on whether the participant worked for a digital marketing agency or worked in-house in a B2B organisation. For marketers working in agencies the questions were shaped to consider their work with their clients, e.g., *When working with B2B clients, do these client organisations track and measure customer engagement*? *How would you recommend engagement to be tracked and measured?* In turn, for participants who worked for in-house marketing teams, questions were focused on their experiences at their organisation, e.g., *does your organisation track and measure engagement? If so, how?* In addition to the questions presented in the table below, the interview commenced with comments to open the discussion and finished off with comments to close it (Saunders, Lewis & Thornhill, 2019), such as thanking participants for their time.

Table 4.2. Summary of the Interview Guide

Research Objectives	**Interview Questions**	**Themes**
1. To explore the use of marketing automation in digital content marketing strategies targeted at B2B customer-company interactions.	1. What digital channels (if any) does your organisation utilise to communicate with your prospective and existing customers?	Customer-Company Interactions
	2. How would you describe the online interactions between your organisation and its customers?	
	3. Does your organisation have a digital content marketing strategy in place?	Use of Digital Content Marketing
	4. What type of technology or digital tools does your organisation use to carry out digital content marketing strategies?	
	5. Can you tell me about your experience with marketing automation?	Use of Marketing Automation
2. To investigate whether these online interactions fostered by marketing automation can influence B2B engagement behaviours.	1. How does your organisation interact with the customer during the customer journey?	Perceptions of Customer Engagement
	2. How do customers engage with your organisation?	
	3. How would you describe the benefits of customer engagement for your organisation?	
	4. Does your organisation track or measure customer engagement?	
	5. Does your organisation utilise any strategies or tactics that aim to boost customer engagement?	Engagement Marketing
3. To understand the extent marketing automation can support and advance a company's engagement marketing efforts online.	1. Do you think there is any relationship between your use of marketing automation and customer engagement?	Impact of Marketing Automation on Engagement
	2. How can marketing automation be best harnessed by B2B organisations to make the best use of the software tool for engagement marketing purposes?	
	3. Are there any facilitating factors that impact the success of applying marketing automation application for engagement marketing purposes in a B2B organisation?	Engagement Marketing

4.8. Sampling

Sampling methods can be divided into two categories, probability sampling and non-probability sampling (Saunders, Lewis & Thornhill, 2019), and from the two, the latter approach was chosen for this study. After all, the use of a non-probability sampling technique is conventional for qualitative research strategy (Saunders, Lewis & Thornhill, 2019). More specifically, this study utilised purposive sampling (see e.g. Holliman & Rowley, 2014), which allows the researcher to use their own judgement in deciding whom to include in the study, to form a sample that is beneficial in enabling the study to meet the research objectives put forward (Wilson, 2011).

Similar approaches to sampling can be found in existing literature. For example, Holliman and Rowley (2014) while studying content marketing, described the use of a key informant strategy, where knowledge is gathered by interviewing industry experts on the topic. The use of key informants has been noted to suit research projects that are in an initial stage, or when the boundaries of the research focus are yet to be established (Corbetta, 2003). Indeed, Holliman and Rowley (2014) justified this approach by acknowledging how content marketing is a recent field, and practitioners were likely to hold the latest knowledge on the topic area. This study was acknowledged to benefit from a similar approach, and therefore, practitioners who already know the phenomenon well, were included in the sample. Furthermore, for this study, the use of a purposeful sampling strategy allows the researcher to focus the study on so-called best-practice cases, allowing the study to better determine the potential of marketing automation for fostering online engagement, rather than for example gathering insights on the average use of the software tool. This way the researcher can ensure that the interviewees have a deep level of knowledge on the topic area (key informant status), adding credibility to their responses, and simultaneously increasing the likelihood that they will be able to give insightful answers to the interview questions.

For this study, the sample consists of 29 digital marketing experts working in the B2B sector. Specifically, the sample consists of individuals who work in digital marketing agencies (including consultancies) (*n*=15) as well as individuals who work in B2B organisations (*n*=14) across different sectors in two countries, Finland and the UK. Both agencies and in-house marketers were included in the sample, as it was quickly acknowledged how some B2B organisations preferred to manage their marketing automation initiatives in-house while others preferred to outsource them to digital marketing agencies.

Of the participants working for agencies (*n*=15), 9 were based in Finland and 6 in the UK. In turn, of the participants working in-house for B2B organisations (*n*=14), 8 were based in Finland and 6 in the UK. The two countries were selected based on convenience and access, as the data collection took place during the COVID-19 pandemic, and thus, the researcher's location at the time (in Finland) impacted the selection of these two countries (despite all data collection being carried out using a video conferencing platform). However, it is worth noting that all B2B organisations included in this study had operations spanning multiple countries, and as work was mainly conducted virtually, the marketer's physical location was not deemed significant for the purposes of this research.

On the agency side, individuals in senior positions in agencies that work with marketing automation were included in the sample. Most agency-side participants had worked with more than one marketing automation solution, as illustrated in Table 4.3. On the in-house marketer side, individuals who work for B2B organisations that currently utilise marketing automation software were included in the study. A description of each in-house B2B participant can be found in Table 4.4. Diversity in the sample was ensured by including different firm sizes and industries, to aid in the formation of an industry-spanning conceptualisation (e.g. Homburg & Tischer, 2023). Therefore, the B2B industries represented in the study include telecommunications, financial technology, information technology, chemicals, paint and coatings, aerospace, manufacturing, and biotechnology. Additionally, to ensure the key informant status, only participants who had previous expertise in content marketing and customer relationship management in the B2B sector were included in the sample.

The marketing automation solutions participants worked with included primarily HubSpot, Eloqua, ActiveCampaign, Marketo and Salesforce Pardot (now part of the Marketing Cloud offering). HubSpot, a CRM platform provider, offers a range of marketing and sales software with various capabilities, packaged into hubs, such as the Marketing Hub and Sales Hub (HubSpot, 2023). Each hub contains a range of tools and functionalities, such as lead generation or analytics, in marketing, sales, and other areas of the organisation (HubSpot, 2023). Eloqua, owned by Oracle, focuses on B2B marketing automation, offering robust solutions with a variety of functionalities including campaign orchestration, segmentation and targeting as well as lead management (Oracle, n.d.)

In turn, ActiveCampaign is known for its advanced email marketing automation and integration features (e.g. to various apps) (ActiveCampaign, n.d.), making it particularly suitable for small to medium-sized organisations. Marketo, (known as Marketo Engage) now part of Adobe, offers a range of marketing automation features, including lead nurturing, personalisation, and analytics, targeted both at B2C and B2B markets (Adobe, 2023). Salesforce, a software company known for its CRM platform, provides marketing automation capabilities through its Marketing Cloud offering (which today incorporates a solution previously called Pardot as part of the Marketing Cloud Account Engagement offering), enabling businesses to automate marketing campaigns, personalise messages and track customer interactions among other functionalities (Salesforce, 2023). Each of these solutions has its own capabilities and target market, catering to the diverse needs of organisations in the realm of both B2C and B2B marketing automation.

Table 4.3 and Table 4.4 describe the 29 experienced digital marketers selected for this study. The first two letters of the interview code illustrate participant location (FI/UK), while the subsequent letter is indicative of their position as either agency/consultancy (A) or in-house (I) marketer. The following number represents the interview number.

Table 4.3. Descriptions of interview participants working for marketing agencies

Interview code	Job title	MA software expertise	Interview length (in minutes)
FIA1	Managing Director	Various	83
FIA2	Senior Consultant	Various	96
FIA3	CEO	ActiveCampaign	100
FIA4	CEO	HubSpot	57
FIA5	CEO	HubSpot	67
FIA6	Strategy Director	Various	87
FIA7	Managing Partner	Various	101
FIA8	CMO and Senior Consultant	HubSpot	85
FIA9	Business Unit Lead	HubSpot	67
UKA1	Head of Strategy	Various	102
UKA2	Director of Innovation and Data	Various	74
UKA3	Co-founder	HubSpot, various	66
UKA4	Senior Marketing Programs Manager	Various	81
UKA5	Managing Director	Various	48
UKA6	Head of Digital	Various	62

Table 4.4. Descriptions of interview participants working in-house for B2B organisations across industries

Interview code	**Job title**	**Industry**	**MA software in use**	**Interview length (in minutes)**
FII1	CMO	Manufacturing and Service	HubSpot	100
FII2	General Manager, Marketing Operations	Manufacturing and Service	Salesforce Pardot	74
FII3	Group Marketing Manager	Paint and Coatings	HubSpot	84
FII4	VP Brand	Aerospace	HubSpot	102
FII5	Director, Marketing Communications	Chemicals	Marketo	59
FII6	Head of Marketing Automation	Information Technology	Salesforce Pardot	72
FII7	Head of Group Customer Insight	Information Technology	Marketo	74
FII8	VP Marketing	Information Technology	Salesforce Pardot	73
UKI1	EMEA Marketing Director	Information Technology	Salesforce Pardot	84
UKI2	Head of Digital, EMEA	Information Technology	Combination of Adobe and Salesforce products	62
UKI3	Director of Marketing Communications	Manufacturing	Salesforce Pardot	56
UKI4	Head of Digital Marketing	Telecommunications	Salesforce Pardot	70
UKI5	Chief Business Officer	Biotechnology	HubSpot	73
UKI6	Growth Director	Financial Technology	HubSpot	54

Having provided a detailed description of the sample for this study in the current section, this chapter will now proceed to address research ethics and elaborate on how this study adhered to best practices. Following this, further insights into the data collection and analysis are provided.

4.9. Research ethics

According to Saunders et al. (2019), research ethics refers to the standard of behaviour that guides the conduct of the research with respect to the rights of those who take part in the research and others affected by it. To ensure ethical practice, any potential ethical issues should be recognised and considered throughout the research process (Saunders, Lewis & Thornhill, 2019). Moreover, to anticipate potential ethical issues, this study considered the six key principles of ethical research outlined by the British Economic and Social Research Council (ESRC) (ESRC, 2015, p.4). The following table illustrates these six principles and the approach taken by the researcher to ensure ethical conduct of research. Additionally, ethical approval from the University of Strathclyde Department of Marketing Ethics committee was sought and granted before the data collection commenced.

Table 4.5. Illustrating the ethical considerations to research and the approach taken to ensure best practices.

ESRC key principles of ethical research (ESRC, 2015)	**Approach taken**
1. Research participants should take part voluntarily, free from any coercion or undue influence, and their rights, dignity and (when possible) autonomy should be respected and appropriately protected.	Participation in the study is voluntary, participants were not coerced to join the study and no incentives (such as payment) were given to encourage participation.
2. Research should be worthwhile and provide value that outweighs any risk or harm. Researchers should aim to maximise the benefit of the research and minimise potential risk of harm to participants and researchers. All potential risk and harm should be mitigated by robust precautions.	The well-being of participants was not damaged as a result of participation. No vulnerable groups (e.g. children) were interviewed and no sensitive topics were addressed.
3. Research staff and participants should be given appropriate information about the purpose, methods and intended uses of the research, what their participation in the research entails and what risks and benefits, if any, are involved.	Participants fully informed about the purpose of the study, methods used and the outcome of a published PhD thesis. A Participant information sheet outlining this information was sent to the participants in advance of their interview. The participant information sheet can be found in Appendix III.
4. Individual research participant and group preferences regarding anonymity should be respected and participant requirements concerning the confidential nature of information and personal data should be respected.	Participants were assured of the confidentiality of their participation. The data gathered was pseudo-anonymised and participant identities were not revealed at any point.
5. Research should be designed, reviewed and undertaken to ensure recognised standards of integrity are met, and quality and transparency are assured.	The research approach was carefully discussed with supervisory team. Additionally, ethical approval from the University of Strathclyde Department of Marketing Ethics committee was sought before collecting any data. Furthermore, the research design is described in detail in section 4.5.
6. The independence of research should be clear, and any conflicts of interest or partiality should be explicit.	This research, and all materials involved, remains the academic property of the researcher and the University of Strathclyde.

4.10. Data collection

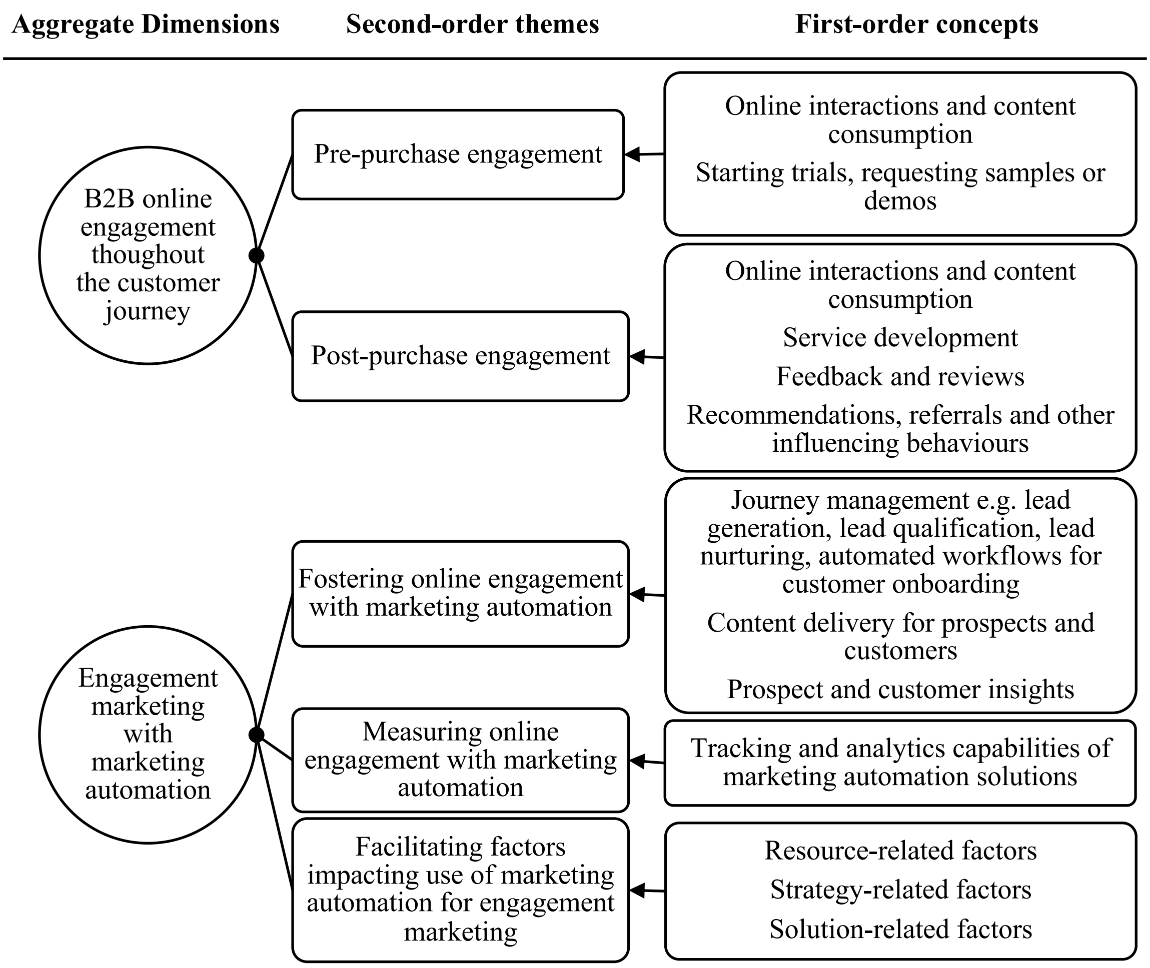
Overall, 29 in-depth interviews with key informants were carried out for this study. These interviews were held online via the video platform Zoom, which also enabled the interviews to be audio-recorded. The total duration of recorded interviews was 36 hours and 53 minutes, with an average interview duration of 76 minutes. The length of each interview is illustrated in Table 4.3 and Table 4.4. The audio recordings of these interviews were then transcribed using a web-based automated transcription tool called Konch.ai. After the interviews were transcribed, copies of the transcripts were then sent back to the participants for approval and validation. At this stage, participants were able to edit the transcripts if they wanted to, which ensured that participants were able to scan the transcripts for any misunderstandings or misstatements. Interviews were continued until the insights provided by participants became repetitive and no new themes that would add to the existing results were found, thus reaching theoretical saturation (Glaser & Strauss, Anselm, 1999). Theoretical saturation was assessed by comparing the interview data and engaging in discussions with the supervisory team to validate interpretations of similarities, differences and reoccurring themes that emerged from the data.

The following section describes the data analysis process. While in this chapter data collection and analysis are presented in two separate sections, it should be noted how in qualitative research, they are interrelated processes (Creswell, 2009; Saunders et al., 2016).

4.11. Data analysis

The data was coded to organise and retrieve meaningful material in order to carry out deep analysis and reflect on the meanings and interpretations (Miles, Huberman & Saldaña, 2013). NVivo software was utilised in coding the data, and the data analysis followed the approach described as the Gioia methodology (Gioia et al., 2013). The data analysis commenced with a process similar to open coding (Corbin & Strauss, 2008), where a large number of first-order concepts were identified. Here the language of the participants was followed when identifying the first-order concepts. Subsequently, the number of these initial codes was reduced by analysing the similarities and differences between the concepts by exploring the theoretical themes and dimensions of the data elements (Gioia et al., 2013). In this second-order analysis, the initial codes are linked to theoretical themes, revealing the relationship between the concepts (Gioia, Corley & Hamilton, 2013). Moreover, current literature was reviewed to identify which concepts are not adequately covered in extant research and thus should be focused on (Gioia, 2020). After identifying a list of second-order themes these themes were refined to two aggregate dimensions. To illustrate the progression of the data analysis, a figure (Figure 4.2) representing the data structure was created. In this figure, the first-order concepts, second-order themes and aggregate dimensions that were constructed for this study, are presented.

Figure 4.2. Data structure



4.12. Quality in qualitative research designs

The proceeding sector describes approaches to establishing research quality in qualitative research designs. It should be noted that qualitative and quantitative research approach the issue of research quality in different ways (Easterby-Smith, Thorpe & Jackson 2008; Saunders, Lewis & Thornhill, 2019). Indeed, measures such as validity, reliability and generalisability –used to evaluate the quality of quantitative research designs– are often perceived as both philosophically and technically inappropriate for evaluating qualitative research (Saunders, Lewis & Thornhill, 2019). Nonetheless, qualitative researchers are divided in their approaches to measuring research quality; some have continued the use of the concepts of reliability and validity –but adapted them into qualitative research–, some have adopted parallel criteria that align with the interpretive philosophy, and others have developed completely new measures for assessing quality (Saunders, Lewis & Thornhill, 2019). Below, the three criteria for evaluating the quality of the research design –validity, reliability and generalisability– together with their parallel criterion, are presented.

Firstly, in qualitative research validity is built by the researcher's ability to construct credible and compelling interpretations of the data gathered on the participant's experiences (VanderStoep & Johnson, 2008). Moreover, demonstrating clear access to these experiences can be used to establish validity (Easterby-Smith, Thorpe & Jackson, 2008). Additionally, the validity of qualitative research can be approached by considering the parallel constructs of credibility (Saunders, Lewis & Thornhill, 2019). Credibility in this context refers to the accuracy of the representations of the participant's socially constructed realities, in other words, the representations reflect how the participant intended them to reflect (Saunders, Lewis & Thornhill, 2019). To enhance the credibility of the study, the participants were sent a copy of the interview transcript for review. Additionally, during the data analysis stage, the data and emerging conclusions were often presented to the supervision team (Riege, 2003).

Secondly, concerns related to the reliability of research can be addressed by considering the dependability of the qualitative research design (Saunders, Lewis & Thornhill, 2019). In qualitative research, reliability is measured by assessing the transparency related to the data analysis and sense-making process (Easterby-Smith, Thorpe & Jackson, 2008). Thus, dependability can be built by creating a detailed recording of the processes, to produce a dependable account that others can understand and evaluate (Saunders, Lewis & Thornhill, 2019). To enhance dependability, the coding process was reviewed by the supervision team, and any divergent interpretations were discussed. Subsequently, examples of quotes to be included in the study were selected together with the research team.

Additionally, three researchers external to the research team were asked to code a sample of the data (found in Appendix IV) independently. The results were compared to the coding carried out by the researcher, by using the proportional reduction in loss (PRL) method (Rust & Cooil, 1994). This method relies on Cronbach's alpha and utilises the proportion of agreement among judges to assess the reliability of the coded qualitative data (Rust & Cooil, 1994). According to Rust and Cooil (1994), for exploratory qualitative research, a level of 0.70 is considered adequate, while a level of 0.9 was considered suitable for advanced marketing research practice. The result of this check yielded 0.92 which was regarded as delightful.

Thirdly, transferability –a parallel criterion to generalisability– can be built by describing the entire research process in detail, which allows others to then evaluate the transferability, and hence the suitability of the study in another setting (Saunders, Lewis & Thornhill, 2019). Moreover, this measure targets the constructs and concepts derived in the study, and their relevance in other research settings (Easterby-Smith, Thorpe & Jackson, 2008). This was previously indicated when comparing the positivist and interpretivist philosophies, as the interpretive philosophy was described to approach generalisation through theoretical abstraction. Furthermore, it should be noted that statistical representativeness is not of interest to qualitative researchers (Corbetta, 2003), and thus statistical generalisability is disregarded from this discussion. For this study, transferability was considered by including participants who worked in different industries in the B2B sector and disclosing their job titles in the participant descriptions. Additionally, full descriptions of research questions, the research design, findings, and conclusions are provided (Saunders, Lewis & Thornhill, 2019).

4.13. Chapter conclusion

This chapter has described the methodological considerations for this research. It commenced by revisiting the research aims and objectives for the thesis, after which the philosophical positions guiding the research methodology were discussed. Two opposing paradigms - positivism and interpretivism - were selected for further review. After careful consideration, interpretivism was chosen as the philosophical position for this study, as this philosophical position was recognised to align with the research aim and objectives, which focus on generating an understanding of the ways marketing automation can influence online engagement in B2B settings. More specifically, within the interpretive paradigm, a phenomenological position was selected as the most appropriate due to the emphasis on understanding the lived experience (VanderStoep & Johnson, 2008).

The underlying philosophical position was noted to influence the methodological considerations, and therefore a qualitative research approach was chosen. Moreover, aligned with the selected philosophical standpoint, this study was acknowledged to embrace an exploratory purpose as well as an inductive approach to theory development. Following this, the research design was described in detail. After evaluating various qualitative research methods, phenomenological semi-structured interviews were selected as the method for obtaining data for this thesis. Moreover, the role of the interviewer was considered, and the interview guide was presented. Subsequently, the decisions related to the sampling were justified and the sample was explained to consist of 29 experienced digital marketers working both in agencies (n=15) and in-house in B2B organisations (n=14). Subsequently, the ethical considerations for the study were outlined.

Following this, both the data collection and analysis procedures were described. The interview data was audio-recorded, transcribed and coded following the principles of the Gioia methodology (Gioia et al., 2013). In total, the interviews generated a substantial amount of data, amounting to 36 hours and 53 minutes. This rich data was organised into a series of first-order concepts and second-order themes, as well as two aggregate dimensions, which will be explored in depth in the following chapter. Lastly, this chapter addressed research quality in qualitative research.

5. Findings

5.1. Chapter introduction

This chapter presents the findings from the semi-structured interviews with digital marketing professionals carried out for this thesis aiming to explore the role of marketing automation in enhancing B2B engagement marketing efforts across the digital customer journey. These findings are discussed in relation to the aggregate dimensions (Figure 4.2) constructed for the study, and they are organised according to the customer journey.

Firstly, section 5 commences with an overview of the key manifestations of online B2B engagement (5.2.1), followed by an overview of the key functionalities of marketing automation across the customer journey (5.2.2), as identified in this study. Subsequently, the findings that relate to the pre-purchase phase (5.3) are addressed, followed by a discussion on those that relate to the post-purchase phase (5.4). Within these sections, a discussion on B2B online engagement at pre-purchase (5.3.1) and post-purchase (5.4.1) is presented, thus aligning with the second research objective, set out to investigate *how online interactions fostered by marketing automation (potentially) influence B2B engagement behaviours*. Additionally, a discussion of the functionalities of marketing automation at the concurrent phase of the journey (5.3.2, and 5.4.2) is presented, thus aligning with the first research objective on *exploring the use of marketing automation in digital content marketing strategies targeted at B2B customer-company interactions.* The focus on pre- and post-purchase phases is due to their emergence from the participant descriptions, while the purchase stage, though acknowledged, did not gain significant mentions.

After considering B2B online engagement and marketing automation across the customer journey, section 5.5 addresses ways marketing automation can foster engagement, thus aligning with the third research objective focused on developing an understanding of *the extent marketing automation can support and advance a company's engagement marketing efforts*. Section 5.5.1 builds on this understanding by discussing ways marketing automation can be used to measure online engagement after which facilitating factors that impact the success of utilising marketing automation for engagement marketing are addressed (5.5.2). The findings are then brought together in a discussion (5.6). Lastly, a chapter summary is presented (5.7).

5.2. B2B online engagement across the customer journey: The role of marketing automation

5.2.1. Manifestations of B2B online engagement

The findings of this study reveal engagement throughout the customer journey, especially during the pre- and post-purchase phases. Notably, the interviewees revealed different manifestations of engagement in different phases of the B2B customer journey. This perspective is illustrated in the comment below.

> *"But maybe we should look at engagement at different stages of the funnel. So, if you're at the top of the funnel, meaningful engagement would be you consuming the content, attending webinars, et cetera. But when you go further down the funnel and you're engaging in, let's say, product reviews or references or testing, that's engagement that happens at that stage of the customer journey. So, it's journey related. The part of the journey or the stage of the journey defines what engagement could be. Because for sure, you wouldn't be doing a referral if you haven't even bought from the company. And it is meaningful, so I would say it is engagement that's related to that stage of your journey." (FII6)*

Overall, participants offered various descriptions of how B2B engagement manifests online. These manifestations included **online interactions and content consumption**, **starting trials**, **service development**, **feedback and reviews**, **recommendations**, **referrals and other influencing behaviours**. These findings demonstrate how engagement behaviours can encompass various forms, thus illustrating how engagement can be understood as a construct that captures multiple behaviours towards the organisation and its stakeholders (van Doorn *et al.*, 2010). Example quotes illustrating each of these manifestations can be found in the following table (Table 5.1).

Furthermore, before exploring these manifestations in detail at both the pre- and post-purchase phases of the customer journey, it is important to describe the key functionalities of marketing automation. After all, this description serves as a valuable foundation for the forthcoming discussion on ways the software tool can be utilised for fostering B2B online engagement throughout the customer journey.

Table 5.1 Manifestations of B2B online engagement

Manifestation	Example quote
Online interactions and content consumption	*"So, for example, if we start from the home base again, we count as engagement buyer people who are coming to the website and interacting with the content of the company. So, for example, they're attending the webinars or watching videos or commenting on something or giving feedback and things like that." (FIA6)*
Starting trials, requesting samples or demos	*"So for one of the businesses we don't offer a meeting or request a call-back or anything. It is "get started", have a free trial. And so, we literally track the use of the product features, have people logged in, things like that. And I would say actually utilising what we want them to buy would be a massive form of engagement." (UKI4)*
Service development	*"And then I think I already spoke about some of these things that you can do to foster engagement, like the customer advisory boards we're doing, like really in different regions, recognise who are the customers you really want to hear from and who you want to get involved in developing your roadmap and developing your business." (FII8)*
Feedback and reviews	*"But when you go further down the funnel and you're engaging in, let's say, product reviews or references or testing, that's engagement that happens at that stage of the customer journey." (FII6)*
Recommendations, referrals, and other influencing behaviours	*"I think this whole sort of social selling aspect of this peer-to-peer recommendation has always been there but is maybe growing in importance going forward. So, for example, LinkedIn for us is a really important channel where people, if they endorse us, I think it has a big impact, whether it's coming through the official corporate channels or if it's actually somebody within your network, that is voluntarily putting positive things out there for you." (FII5)*

5.2.2. Marketing automation throughout the customer journey

The purpose of this section is to outline the primary functionalities of marketing automation identified through the collected data. These functionalities serve as a foundation for the forthcoming discussion on the utilisation of marketing automation in engagement marketing, as presented later in this chapter.

The findings reveal that marketing automation is a software tool with multiple capabilities, and therefore, this thesis will consider it as an umbrella term for simple automated marketing actions. These marketing actions can be grouped into three categories, **journey management**, **communications**, and **marketing insights**.

Firstly, marketing automation relies on predefined rules established by the marketer to determine how actions taken by prospects or customers are responded to. These pre-determined actions, such as a newsletter sign-up, are referred to as triggers, as they initiate an automated response. In turn, these rules and triggers can be sequenced to form automated workflows, also known as nurturing streams, which help marketers in prospect and customer **journey management.** The following quote elaborates on the use of triggers and illustrates how marketing automation can be used to manage the customer journey through the creation of predefined sequences of marketing activities.

> *"For me, it's some kind of marketing action that is triggered automatically, or basically triggered automatically based on some kind of behaviour or well, usually it's a behavioural event. So, there's an automated trigger that triggers the marketing activity. Oftentimes, we think about marketing automation being really email focused. It could be something else as well. It could be basically a call, it could be an SMS message. It could be a push message. It could be a direct message in some other service. But I think that the core is that there's some kind of like specified trigger that activates the messaging or their communication or the marketing activity." (FIA2)*

Secondly, as acknowledged in the comment above, the consequent actions often take the form of a **communication**, for example, an automated email, linking marketing automation with the organisation's content marketing efforts. This link between pre-defined triggers and communications is additionally illustrated in the following quote.

> *"So, instead of waiting to outwardly communicate to a customer at the time that you think is right, for me, it's about listening, in the broadest sense of the word, to sort of, you know, website visits, reviews been made, complaints been made, something like that. So, you're listening to what's going on in your customer or prospect set and you're acting on it in the form of a communication, without the need for manual intervention, is how I describe it." (UKA1)*

The third key characteristic of marketing automation relates to the software's ability to gather and process data in the online environment, which the participant above referred to as *"listening"*. Indeed, the **marketing insights** gathered from tracking the behavioural footprint of a prospect or customer online are utilised to improve the effectiveness of the organisation's digital marketing efforts, for example through improved personalisation and timely messaging. Moreover, when discussing **journey management**, **communications**, and **marketing insights**, it should be noted how these three categories are often interlinked. For example, both **communications** and **insights** impact the **management of journeys** and **insights** impact **communications**. The following table contains further examples of quotes illustrating the three categories discussed above.

Table 5.2 The key functionalities of marketing automation

Categories of functionalities	**Example quotes**
Journey management	*"Marketing automation is about putting systems and processes in place to make your marketing more efficient. So, you are creating message flows and communication flows that are triggered-based to help you tell a consistent story that is relevant to that person, at a particular point in that their customer lifecycle. It's about creating efficiencies in your marketing operations." (UKA3)*
Communications	*"And I think that if I was to explain marketing automation, I would say it's a tool which can allow you to have regular, consistent, monitored, reporting and campaign communications with a client base." (UKA4)*
Marketing insights	*"I guess marketing automation is really based on using the data that is available from multiple different places in the company to develop smart marketing activities for different buyers in different stages of their journeys." (FII8)*

So far, this chapter has provided an overview of the manifestations of online engagement and the key functionalities of marketing automation across the customer journey. The following sections will delve deeper into these topics, discussing the specific manifestations of online engagement and examining how marketing automation facilitates engagement at different phases of the B2B customer journey. To illustrate the key functionalities of the tool in the different phases of the customer journey the process model by Lemon and Verhoef (2016) with three stages –pre-purchase, purchase and post-purchase– is adapted. Here, the purchase stage – encompassing behaviours such as choice, ordering and payment (Lemon & Verhoef, 2016)– is acknowledged, however, this thesis will focus on investigating the pre- and post-purchase phases of the customer journey.

This decision was made for two key reasons. Firstly, the participants' descriptions of both online engagement and the use of marketing automation were focused on the pre- and post-purchase phases, and the participant descriptions pertaining to the purchase phase primarily focused on the actual transaction. This is perhaps unsurprising, as the purchase phase has shortened as a result of the increased significance of the touchpoints in the pre-purchase phase, allowing for buyers to only contact the seller when they want to finalise the deal (Ahearne *et al.*, 2022). Hence, due to the limited emergence of the purchase phase in the data, determining the boundaries of this phase would have posed challenges. Additionally, the role of human interaction, rather than automation, was often described to increase the closer the prospect gets to making the purchase decision, impacting the need for automated interactions.

Secondly, as participants were recruited from across industries, the specifics of the use of marketing automation in the purchase stage were found to be dependent on the IT architecture of the organisation. Some participants explained how at this stage the information from the marketing automation system is transferred to the CRM system, while others reported the use of one integrated system encompassing both automation and customer data management capabilities. Therefore, as this thesis seeks to investigate the use of marketing automation specifically, it will focus on examining the software tool and its influence on online engagement, in the pre- and post-purchase phases of the B2B customer journey.

Nevertheless, despite the representation of pre- and post-purchase phases, it should be noted that in reality, B2B purchasing journeys are not linear, and both prospects and customers can move back and forth, as well as leave and re-enter their journeys over time (Järvinen & Taiminen, 2016). Keeping this in mind, a discussion of the pre-purchase phase is presented next.

5.3. Pre-purchase phase

5.3.1. Evidence of pre-purchase engagement

This section details how engagement manifests in the pre-purchase stage of the customer journey. Key manifestations outlined by participants at this stage included **online interactions and consuming digital content,** as well as **starting trials, requesting samples or demos**, linking pre-purchase engagement with the organisation's digital content marketing efforts. Through producing and distributing online content, organisations aim to increase prospect involvement, which in turn, has been demonstrated to be an antecedent of engagement in consumer settings (Hollebeek, Glynn & Brodie, 2014; Harrigan *et al.*, 2018). Similarly, involvement with digital content emerged as an important element of participant descriptions of pre-purchase engagement, as illustrated in the comments below.

> *"If somebody is very engaged, they typically follow us in multiple channels. They have read multiple pieces of content. They've maybe liked what we were doing and so forward. So, it's not just like, OK, you come to the website once and then you go. But it's like you come there once, maybe you find something interesting, you follow us on social media, then you keep coming back, you subscribe to our newsletter. All of these types of activities. Engagement then looks different when you start a trial, for example. So, then when you're starting a trial, we have a ton of things you can do with our platform. So, you can just turn the service and try [offering], for example. But you can also try out different integrations. You can invite your colleagues to the platform. You can do multiple different things. And there are ways for us to measure this. And of course, the more you do with the platform, the more engaged you are." (FII8)*

Moreover, the prospect's voluntary resource contributions (e.g. van Doorn *et al.*, 2010), such as time and effort spent on **consuming digital content,** often reflected the prospect's desire to determine the fit of the solution to their needs. Therefore, engagement occurring in the pre-purchase phase of the customer journey impacts subsequent resource contributions and the prospect's propensity to buy. Hence, pre-purchase engagement was often described as being purchase-oriented, where engagement enables the prospect to move forward in their buying journey. As one participant (FII5) phrased it, *"engagement is really required before activation can happen so that you are able to get them to take some action"*. Accordingly, engagement was perceived to increase the closer the prospect would get to the purchase, especially when more members of the buying and selling teams became involved with the decision. The following comments explain the significance of online pre-purchase engagement in B2B markets.

> *"We see most engagement in the evaluation phase. So, when a customer has this idea that they will buy something, but they don't necessarily know what and from whom. That's like the research or evaluation phase. And most important, I would say before that. In this world, both in the [industry] and [industry] markets, basically, the deals are won before the spec is written. So, when we are before the evaluation phase or where we can influence what will that spec be, or what will be the customer happy with." (FII2)*

> *"We need more, much more engagement for our sake, but for the sake of the customer as well. I feel like they are in the dark for a large period of time because the knowledge of a deal only comes to us past evaluation normally. So, we can only engage them later, which means less engagement as well. Also, I often tell the salespeople that when you're not in front of a customer, which is 99.5% percent of the time, we are. For every minute you spend with them, they have spent a number of minutes reading, researching online content, so the engagement has to be manifold compared to like that one sales call or one sales e-mail." (FII2)*

The participant above describes how prospects and customers can engage with the organisation through online content before engaging with a salesperson. A similar perspective was presented by another participant, who suggested how "*engagement should flow maybe from the digital side to the actually meeting people or seeing them face-to-face." (FIA6).* This idea of engaging with non-human actors in the early stages of the customer journey is also reflected in the following comment.

> *"The less concrete, but more kind of like conceptual connection would be that the person that you're targeting or the people you're targeting in an organisation, they are already engaging with us, the company, before they talk to a human. And that I would measure as engagement, when they are reading our materials, engaging in thought processes along the way, which are largely automated. So, if we have a content campaign where somebody downloads something, they get a drip email that pushes them to the next content piece, they download that and then there's an activation to our sales at a later date and maybe we can set up a time to talk kind of like a thing. And it's at that point when a person comes in from our side to actually make sure that everything's okay and this is valid. They've already engaged with us. And that's where marketing automation just steps in between, can be something where the audience feels engaged and we are, as an organisation engaging with them." (FII4)*

As identified by the participant above, the presence of digital content as a medium for online engagement highlights the potential offered by non-human actors, such as automation, in fostering engagement, especially in the earlier stages of the customer journey. The next section will contribute to this understanding, by addressing the functionalities of marketing automation in this journey phase.

5.3.2. Key functions of marketing automation in the pre-purchase phase

With regard to pre-purchase **journey management,** lead generation, lead nurturing and lead qualification were identified as key activities marketing automation can support. Additionally, **communications** through content delivery and harvesting **prospect insights** emerged as supplementary key functionalities. Table 5.3 (p.106) illustrates these functionalities together with illustrative participant quotes.

Lead generation refers to the identification of potential customers. After these prospects are identified, through for example IP address tracking or the prospect submitting their contact details to gain access to gated content (Järvinen & Taiminen, 2016), they are processed and placed on automated workflows, in which the prospect receives content relevant to their query at a sequence that is pre-determined by the marketer. This process is referred to as lead nurturing**,** where through information provision, the aim is to develop a relationship between the buyer and the seller (Järvinen & Taiminen, 2016; Paschen, Wilson & Ferreira, 2020). Moreover, the type of content delivered to the prospect depends on where the prospect is in their buying journey. As B2B buying processes can involve multiple decision-makers (Jussila, Kärkkäinen & Aramo-Immonen, 2014; Habibi *et al.*, 2015) with divergent information needs, automation can be utilised to personalise the content to match the interests of these actors. Therefore, as the following quote indicates, lead nurturing and **communication**s are highly interrelated processes.

> *"So, for example, we are already using our data on marketing automation to send very tailored messages to our trial users. For example, saying, hey, I saw you starting a trial with Product X, and you have this plan, here's some messaging for you, for example. So, we try to make it be based on what the customer is trying to do instead of just sending a generic thank you for starting an [company name] trial email." (FII8)*

The ability to gather prospect **insights** enables the delivery of personalised **communications**, leading to more informed efforts in nurturing the prospect relationship. After all, participants explained how in the early stages of the customer journey, marketing automation is utilised to track and collect data on website visitors, through for example capturing the number of landing page visits, increasing transparency in the early stages of the customer journey. The participant below describes the connection between these **insights,** digital content delivery and lead nurturing.

> *"It's a very simple connection because with marketing automation, you'll start to see that the person is searching for something. You see the behavioural footprint. Okay, this person does not know what they really want, and that is the moment you can really activate your touchpoints and produce more services. Ask questions. Do a quiz or something…, activate your automation and activate your channels to generate more touchpoints to this person." (FIA1)*

In addition to delivering content in a set sequence to the prospect, marketing automation is also utilised to estimate the prospect's propensity to buy. Estimates are based on the prospect's online navigation paths, where marketing automation is utilised to gather information on their content consumption preferences and interests (Järvinen & Taiminen, 2016). Thus, as the following quote illustrates, marketing automation can be utilised to support the lead qualification process.

> *"Because with automation, you can also combine that data and use that data to predict certain patterns, like, for example, lead scoring or what we call trial scoring, looking at the customer's behaviour, what are they doing, but also the demographic factors and combining that into like how cold or warm is the customer or what type of interactions could we take and so forth. Of course, there's a lot of power in that type of prediction as well. So, I think it's more than just about automating emails that are personalised. It's even bigger than that. Like, how can you really use data in a predictive and interesting way?" (FII8)*

As described in the previous comment, the data analytics capabilities included in marketing automation solutions are suited for segmenting prospect lists. These processes allow for the generation of actionable **insights**, for example represented by lead scoring. The lead score is affected by various factors such as the prospects activity levels, making it a dynamic score that changes over time (Järvinen & Taiminen, 2016). The significance of lead qualification was illustrated by one participant (UKA5) who noted how *"what it [marketing automation] really does is just help you find the wheat from the chaff quicker. I think in B2B selling that's one of the most important lessons, to qualify, qualify, qualify*". Moreover, activities related to lead qualification traditionally rely heavily on salespeople as well as their support teams (Paschen, Wilson & Ferreira, 2020). Therefore, the findings indicate how utilising marketing automation can improve the efficiency of the lead handover between marketing and sales. This is elaborated on by the participant below, who worked in-house for a B2B organisation.

> *"Because we, of course, don't want to be feeding the types of leads that bring no value. So, then, you know, here the automation of Marketo [marketing automation system] comes into play as well. So, we can set different kinds of rules, if it turns out that some leads, for example, never lead to anything, a very simple example would be if the company submitting the inquiries is too small or from an industry that we don't serve or from a country we don't serve or something like that, then you can remove quite a lot of unnecessary human work from the process when you set these rules. So, the flow needs to work both ways. And of course, sales need to see these interesting moments, as they're called in Salesforce, that our customers or prospects have taken in terms of the marketing campaign interests, so if they've attended a webinar, then it's a clue for you to call them up and say, "I see you've attended our webinar and so on, so would you like to hear more about it?" and these kinds of things. And then of course, for us to always improve the quality of the leads that we're feeding into the pipeline." (FII5)*

While the insights provided by marketing automation can improve the efficiency of the lead generation, nurturing and qualification process, human judgement is required to interpret the information (Paschen, Wilson & Ferreira, 2020). Additionally, with personalised or complex offerings, salesperson involvement is typically needed in the closing stage (Paschen, Wilson & Ferreira, 2020). Therefore, the value of marketing automation can be noted to be more significant in the earlier stages of the customer journey, impacting the overall time it takes for a prospect to move through the purchasing journey, as indicated by the following quote.

> *"I think the biggest impact is that it shortens the overall timeline. It does happen like... I feel that it happens along the way. It's important to know that it affects the whole thing, but the largest effect probably happens in not having sales talk to cold contacts. That we focus sale's time. The automation has dealt with getting a person to the stage where they are a warm lead and then sales can go forward. And I think that's where the biggest business level impact comes from, from the perspective of, like a very selfish company perspective, I think that's where it impacts the most. From the buyer's perspective, the biggest impact is the online items that are critical for them to have, so they don't have to fight with us to get a sample data set, they can just do that stuff on their own. And their experience and engagement level is higher because they don't have to talk to us to get the thing that they need to move forward into the pipeline." (FII4)*

To summarise the findings presented in this section, Table 5.3 provides additional illustrative quotes of the pre-purchase functionalities of marketing automation. In turn, the next section will address the rich participant descriptions of the post-purchase stage, both with regard to the use of marketing automation and manifestations of online engagement.

Table 5.3. Functionalities of marketing automation in the pre-purchase stage

Category	Functionality	Example quote
Journey manage-ment	Lead generation	*"Well the most optimal would be to… Those places where you can gain the most [with automation], and typically those are like generating leads or trying to nurture the leads and help them to go forward in their decisions." (FIA5)*
	Lead qualification	*"So, what it means for us is, coming back to your question, is about an extremely efficient way of us qualifying our prospect base to see whether or not there's any customers in there that are showing, or have a desire to buy from us, from that point of view. So, that's one of the prime examples that we're looking at, from a [marketing automation] platform point of view." (UKI3)*
	Lead nurturing	*"I think the automation has, kind of like, the main point for automation is right after the lead is generated and then, to kind of like, push people or the contacts into different workflow funnels, and then to nurture those into sales qualified leads. That's kind of like the top of the funnel functionality of automation, in my thinking." (FIA6)*
Communi-cations	Content delivery for prospects	*"Because again, as I said, it's unlikely people are going to marry us on the first date. And those good old rules of thumb, seven to 10 content touches before the customer will contact the vendor. And probably one size fits all content or single format is not going to cut it. You need different types of propositions, messaging depending on the customer journey or the stage of the customer journey. So, obviously, marketing automation, driving that sort of efficiency at scale there, can really help catering to this sort of variety of different types of content and the different stages of the customer journey you're dealing with." (UKI2)*
Insights	Prospect insights	"*Ultimately, one of the things that marketing automation technology gives us is the ability to impact the buyer journey, the customer journey beyond that kind of, depending on what stats you read, 70 to 90 percent of the research is done before a salesperson gets involved. Marketing automation technologies allow us to see that activity. And hopefully, if we've got it set up correctly, we can look at what people are doing. We can see that they are going through our customer journey. They are filling out a form. Right, they've filled out form. What have we sent them? What are the pages that we've done? They then need to look at that from a persona and a customer journey point of view to then really build out that proper understanding." (UKA6)*

5.4. Post-purchase phase

5.4.1. Evidence of engagement post-purchase

The key manifestations of post-purchase engagement were acknowledged to include **online interactions and content consumption**, **service development**, **feedback and reviews**, and **recommendations, referrals and other influencing behaviours**. Aligned with the discussion presented on pre-purchase engagement, **online interactions and content consumption** were reported to be key manifestations of engagement also at post-purchase. This finding is demonstrated in the comment below.

> *"Some people are just fans of the company, and they will read every email and comment on every post they will see on social media. I think the same goes on in the B2B world. One difference there is that the people in the B2B world, the people who made the decision to buy from you, they are really interacting with you. Every time they read every email and they want to, because the bigger the company is there is always people who don't want any change. For many months, you need to sell inside that this decision was a good decision" (FIA3)*

Therefore, from the selling organisation's perspective, maintaining communications, through for example email newsletters as described above, is a way to foster engagement and consequently nurture the customer relationship. Regarding service development, participants acknowledged how customers can help improve the organisation's offering. This is illustrated in the comment below.

> *"So, an engaged customer base will help you better develop your product. We run loads of workshops, feedback groups, user group testing, like in the field, with our customers. And so that's another good thing." (UKI4)*

These co-developing behaviours have been identified by Jaakkola and Alexander (2014) as a type of customer engagement behaviour, defined as customer contributions of resources to facilitate the development of the provider's offering. Similarly, as mentioned above, feedback emerged as another key conceptualisation of post-purchase engagement, aligning with suggestions made by Pansari and Kumar (2017) on customer feedback being an (indirect) component of customer engagement. Similarly, reviews emerged as another key manifestation of engagement, as illustrated by the following quote.

"Within that realm, like giving reviews or referrals and this kind of thing, I would say that it is engagement because it is building a win-win situation even after you've bought something… and I would count it as engagement." (FII4)

Moreover, participants emphasised the importance of both referrals, recommendations and other influencing behaviours in B2B markets. This perspective aligns with existing studies that have noted referrals and referencing behaviour as prominent engagement behaviours (Pansari & Kumar, 2017; Jaakkola & Aarikka-Stenroos, 2019). The following quote illustrates the significance of customer endorsements for the brand.

"They're[engaged customers are] more likely to recommend you and talk about your company to other people and build your reputation that way and brand awareness that way." (FIA6)

Furthermore, influencing behaviours (see e.g. Jaakkola & Alexander, 2014; Pansari & Kumar, 2017) emerged as another key manifestation of engagement, as demonstrated below.

"I think, I mean, the biggest kind of type or demonstration of being engaged with a brand is talking about the brand and ultimately shares are always kind of the thing that we look to as being the biggest sign of customer engagement. So, yeah, I guess you can split it out in terms of someone being a promoter of your business, someone being a user of your business, and those are the key kind of differentiators. And I think you can get people to be promoters of your business, then that's a much kind of clear indication that they're more engaged." (UKA3)

Overall, the findings presented in this section align with the perceptions of manifestations of customer engagement presented in extant literature (e.g. Jaakkola & Alexander, 2014; Pansari & Kumar, 2017; Jaakkola & Aarikka-Stenroos, 2019). The following section will turn to examine the key functionalities of marketing automation post-purchase.

5.4.2. Key functions of marketing automation in the post-purchase phase

Complementary to the earlier stages of the customer journey, the key functionalities of marketing automation post-purchase relate to **journey management**, **communications** and **insights**. However, in this phase, the functionalities related to journey management and communications were noted to be highly interlinked. For example, participants noted how marketing automation can be harnessed in the customer onboarding process in which customers receive relevant information through an automated sequence, as described below.

> *"So, we know, if you're drawing out a map of saying right, if a customer acts as, you know, downloading content item A, B and C, in the sequence like that, then ideally, what you should be doing is using your MA [marketing automation] platform to sort of drip feed that information anyway to the customer in the appropriate time. So, that, you know, once they become a customer, then you say right actually you bought the product, you should be reading this document now, then a week later, another document and a week later, so that's the way you build that capability. (UKI1).*

Building on **communications**, participants widely agreed that marketing automation can be utilised to drive feedback, reviews, and recommendations through automated communications, linking automation with engagement marketing efforts. These automated communications ask the customer to for example fill out a customer satisfaction survey or provide a review on a review platform. The sequence in which the customer receives these communications is pre-determined by the marketer, and the workflows are typically structured in a way where if the customer does not react to the messages in a set time period, a reminder request will be sent to the customer automatically. The following quote illustrates the benefits of utilising automated messaging to request feedback.

> *"Feedback is one of the best ways to get some profits out of your marketing automation. People are many times too busy to make the recommendation and give feedback by themselves. But if you ask and the timing is correct, you'll get much more feedback, and we see that the more you ask for feedback the more feedback you'll get." (FIA3)*

With regard to **insights**, participants expressed how the data gathered by marketing automation solutions is utilised to identify new sales opportunities, such as opportunities to up-sell or cross-sell. As one participant (FIA6) expressed, *"the second part where automation works very well is when the opportunity has become the customer already and you want to create up-sales or cross-selling for the same prospect*". After all, some participants highlighted how after the prospect becomes a customer, the ability to gather rich insights increases. Examples of data collected at that stage include product or service usage (especially with SaaS offerings) and customer service contact logs. These **insights** can be utilised in the creation of detailed customer profiles, which in turn can be utilised to identify new customer needs (Paschen, Wilson & Ferreira, 2020). Additionally, the increased availability of **insights** from data contributes to more targeted communications, as suggested below.

> *"And I think the best results are also coming from between the first purchase and maybe the point the customer is becoming profitable. And it really depends on the business, how long that time period is. But that is the profitable way to use marketing automation. Because the moment you get the first purchase is the moment you start to get data exponentially compared to the data that you get before the first purchase. So, the more data, the more personalised the marketing automation can be." (FIA3)*

However, as the B2B buying journey is not linear (Järvinen & Taiminen, 2016), it is worth noting that existing customers can also re-start their buying journey as prospects in the pre-purchase stage. In these instances, the data-storing abilities of marketing automation are highly beneficial. For example, marketing automation systems can store key information such as IP addresses or the email addresses of customers for significant periods of time, making the identification of the prospect straightforward when they become active again, even after periods of inactivity (Järvinen & Taiminen, 2016). Moreover, the increased data available on existing customers on their interests, communication preferences and purchase history can be utilised in the lead nurturing process.

Overall, the findings described in sections 5.3 and 5.4 demonstrate the primary manifestations of B2B online engagement, together with the key functions of marketing automation at the concurrent journey phase, as identified in this study. The aim of the next section is to bring these insights together to explain how marketing automation can be used to advance an organisation's engagement marketing efforts, both prior to and following the purchase.

5.5. Engagement marketing with marketing automation

Firstly, the findings of this study demonstrate how the use of marketing automation can drive B2B online engagement through more systematic, personalised, and timelier **communications** with both prospects and customers. Moreover, the use of marketing automation allows the selling organisation to both create, manage and automate more touchpoints with their audience, consequently resulting in more opportunities for engagement, as described in the comment below.

> *"We capture an amount of touchpoints that would be missed without marketing automation. And we are able to deliver kind of outbound engagement opportunities at a scale that would be impossible without marketing automation". (FII2)*

Additionally, regarding the pre-purchase phase, the data collection abilities of marketing automation solutions can be utilised to estimate where the prospect is in their respective buying journey (**marketing insights**). Based on this information, the prospect can then be placed on the correct automated workflow (**journey management**), enabling the prospect to receive relevant and timely content that supports them in proceeding in the buying process. After all, the participants emphasised how the use of marketing automation enables the creation of more personalised and thus compelling customer journeys. In particular, the ability to personalise **communications** at a scale can be viewed as a key enabler of engagement marketing. As illustrated below, the use of marketing automation also enables personalised offline interactions, in addition to online interactions.

> *"So, we utilised the marketing automation to, let's say as a sales intel tool. We would be able to, based on the insights from marketing automation, tell our salespeople on a weekly basis, "these are the accounts that are reacting positively, you should probably call them or visit them in this order. These are the selling points that they have already engaged with, but these are the ones that they haven't seen, and they have missed, so you should emphasise these"." (FII23)*

The findings addressing the post-purchase phase provide valuable insights into the role of marketing automation in stimulating B2B post-purchase engagement. Firstly, in the post-purchase phase marketing automation can be utilised to drive customer engagement through automated customer onboarding processes that involve content provision at a pre-determined sequence (**journey management**). Specific to the post-purchase phase, marketing automation can have a significant nurturing role through maintaining **communications** with customers in the long term, as demonstrated by the following quote.

“Because when you think of long term-relationships which go on for years and years and years. Marketing automation is a simple tool to keep the engagement going on. So that you have some kind of contact. Even though it's not actively purchasing something from you constantly, it keeps that company, that provider, on top of the mind, that they exist, and they are there whenever you need the services.” (FIA1)

Additionally, marketing automation can also be used to encourage customer feedback, reviews and referrals through automated **communications**, such as email reminders, as described in the following participant quote. Alike the following quote, various participants suggested incentivising customer reviews as a way to foster B2B engagement. These findings align with suggestions by Harmeling, Moffett & Palmatier (2018) on the importance of motivating, recognising and rewarding customer efforts in engagement marketing initiatives. Moreover, the comment below also illustrates how marketing automation can be used to both stimulate and respond to customer actions.

“So, this chat that I mentioned, we also have different rules there that trigger messages to the customers. So, if the customer has received, for example, good customer service from us, they would be getting a message from our CEO or somebody from our senior team saying, "Hey, go to [a review platform name], and give a review and we'll give you a T-shirt in exchange" or something. Or we might do a charity donation or something like that. So, we try to also proactively do that. Of course, some of our customers do that without us prompting them, which is also great.” (FII8)

Furthermore, regarding **marketing insights**, marketing automation solutions enable harnessing insights on engagement with customers which facilitate organisational learning. After all, engagement data has been acknowledged to provide a more accurate perspective of customer value to the organisation, consequently influencing strategic decisions related to for example targeting or key account management (Harmeling, Moffett & Palmatier, 2018). Indeed, as indicated by the comment below, marketing automation was often noted as a necessity for today’s online engagement marketing efforts.

“If you think of it as that two-fold thing…, A) helping you keep better data, so, your engagement can be more meaningful and more powerful and not the same message over and over again. But B) Also, within the constraints of not saying the same thing over and over again, you will want to automate some of it because not everything can be done by humans. Humans are, there's a finite resource, and you don't want to be investing all the time in just someone engaging with this person. So, there'll be some automated

> *messaging. Sometimes the messages obviously have to happen instantaneously so it cannot be done by humans. So, both of these pieces mean that better marketing automation leads to more personalisation and more instantaneous, more timely responses than a human can provide. So, yes, marketing automation, by which I mean non-human driven marketing, without a human pressing a button to make it happen, is critical in doing it well, getting that right time, right message, right person combination correct as often as possible." (UKI6)*

As acknowledged above, marketing automation can be noted as a key tool for collecting and analysing engagement data, informing future engagement marketing strategies. The following section will build on these insights, by addressing ways marketing automation can be used to capture B2B online engagement. Subsequently, factors facilitating the success of marketing automation-driven engagement marketing initiatives are discussed.

5.5.1. Measuring engagement with marketing automation

With regard to measuring online engagement, marketing automation was perceived to be valuable in capturing data on prospect and customer behaviour online. Participants described how the most used metrics for measuring online engagement related to the frequency of online interactions and content consumption. For example, participants listed website-related metrics such as click-through rates, time spent on site, scroll-depth, click maps, visiting certain pages (such as campaign pages), form fill-outs and gated content conversion rate, as ways to measure online engagement. Regarding social media, metrics that participants listed included shares, video views, likes and comments. However, with social media interactions, participants overall exhibited how a single action, such as a like or a share, on its own, typically was not regarded to signal significant engagement. Nevertheless, participants noted how engagement was built over time, and therefore a combination of such actions could signal notable engagement. This is illustrated in the following comments, where the participants describe how various prospect and customer actions are given a value and tracked, which then accumulates to an engagement score.

“Every single touch point is scored, so we're going to look at general like overall score for every website visit, search query, all the things that I mentioned earlier, email open, email click, webinar registration, particular product pages, visualisation and so on, session length. And then we have category scores for each of our product lines so that we can infer which product are you actually interested in. So, that's how we categorise it. And then we utilise these scores as a proxy for activity to quantify how much you've done compared to your peers and compared to the overall median.” (FII2)

“And then I..., also talk about engagement in terms of breadth and depth, so how many actions is any given customer taking over what period of time? So, with tools like HubSpot [a marketing automation system] and others, you can get down to see a specific individual's journey across multiple channels and touchpoints with your brand and say what sort of breadth and depth of engagement is that person having. Did they just visit the website once and never again? Versus a user that's been seen social ads, reacted on social, also active on the website and things like that.” (UKA1)

Additionally, the metrics used to measure online engagement were found to depend on where the prospect or customer is in their customer journey. This aligns with the previous findings of the study on how manifestations of online B2B engagement are dependent on the journey phase. When asked about how engagement is measured, one participant explained the following.

“So, of course, as I said, in the earlier part of the funnel, there is your activity level… but then the other thing is interaction… do you actually, not just like, have you read something, have you maybe shared it? Have you followed us? Have you tried to... is it bi-directional? Is it not just like OK, you've done something. Then on the product side of things…have you invited your colleagues to the platform, have you used integrations, are you using one service or multiple services and so forth. And then of course interactions with us, and what is the type of that interaction. Before you become a customer, you don't typically give us feedback on our roadmap or features or things that. It's more focused on, OK, I'm trying to understand whether this is a good fit for me or not. When you become a customer, it becomes different. Of course, there is revenue growth, how many services you're using and things like that and the support interaction. But then there's also this part of like how do you interact with our sales and customer success organisation? Are you an active promoter of [company name]? Is the NPS [net promoter score] score good? Are you happy with us? But also, are you happy to share some of that and are you happy to contribute to what we're doing?” (FII8)

Taken together, it can be suggested that currently, no single measurement can effectively capture B2B online engagement, and therefore a combination of various online metrics is used to track and measure its manifestations throughout the customer journey. In addition to online metrics related to content consumption, other measurements used to capture engagement included the number of product reviews, feedback surveys, webinar attendance, email open rates and email reactions (such as unsubscribing), clicking on paid advertisements, sentiment scores, prospect or customer participation, use of product (with SaaS products where usage can be tracked), and finally sales. For example, when asked about ways to measure engagement, one participant simply responded, *"in euros" (FIA4)*, referring to sales. Moreover, engagement metrics could also be analysed on a customer level, where insights on the different interactions of individual prospect- or customer-company employees were brought together. If the engagement scores of multiple individual personas representing the same company are high, it can be seen as an indication of an approaching purchase decision (Terho *et al.*, 2022).

Overall, the findings described above build on the ideas of Lundin and Kindström (2023), who emphasise the importance of considering sequences of touchpoints (over one single touchpoint) in managing digitalised B2B journeys. Here, this perspective is extended to the measurement of online engagement, as the combination of a range of online metrics enables the organisation to embrace a variety of indications of engagement over time. Furthermore, marketing automation can be regarded as the engine that enables capturing and exploiting this large number and variety of online metrics, allowing the organisation to build a more meaningful understanding of engagement over time. Next, this chapter will turn to consider factors that impact the success of utilising marketing automation for engagement marketing.

5.5.2. Facilitating factors

The findings reveal valuable insights into the facilitating factors, risks and potential downsides that relate to the adoption and use of marketing automation for engagement marketing. These factors were grouped into three categories, **resource-related factors**, **strategy-related factors,** and **solution-related factors**. The participants identified the following **resource-related facilitating factors**: adequate skills and training, correct set-up and use, and sufficient time, data, and capital. Consequently, **resource-related risks** consisted of the risk of mistakes and misuse, overutilisation and overbuying, as well as the overall large investment typically associated with the adoption of marketing automation solutions. Regarding misuse, one participant highlighted the following.

"I think it's like, how can you think about marketing automation as a way of improving the customer experience rather than a way of bullying people into giving you a review or referral" (UKA1).

Similarly, another participant pointed out how *"another risk is to just turn your marketing to a glorified spam machine or newsletter machine, which should never be the case, but it is easy to end up there"* (FII2). Therefore, when creating engagement marketing initiatives with marketing automation, the quality, rather than the quantity of communications should be focused on. This perspective is illustrated in the comments below.

"But it's about what you say and ultimately the content that you create. And that's much more important in driving engagement rather than how you actually send those communications out." (UKA3)

Subsequently, as some participants suggested, organisations should consider the volume versus value argument, thus focusing their efforts on engaging with those who have the highest potential to convert to profitable customers, rather than communicating with everyone they can reach. After all, targeting everyone with automated communications may be counterproductive, as it may create challenges with resource allocation, for example in the later stages of the buying journey where human presence is typically required. On the other hand, not utilising the software tool effectively emerged as another resource-related risk. The participant below describes a typical case of underutilisation, where only the email capabilities of marketing automation solutions are harnessed.

"The other classic case probably is that say, you use your marketing automation tool mainly for emails, so, email delivery. And really just kind of as a delivery vehicle without having then factored in much of actual targeting or a bit of a sequential messaging, let alone this being kind of behaviourally driven and targeted based on customer behaviour and so on." (UKI2)

Appropriate **strategy** also emerged as an important theme when discussing facilitating factors of marketing automation use. Participants agreed that the use of marketing automation should be guided by an overarching **strategy** dictating marketing and sales goals, as well as a digital content marketing strategy. Related to this, both the quality and quantity of digital content were identified as key facilitating factors for online engagement marketing. Subsequently, as one participant described it, the production of content can become a significant challenge for an organisation.

> *"And yeah, the third challenge is volume. So, marketing automation is a hungry beast. So, you need to have content all the time for the different stages. And the content needs to be fresh. It needs to be relevant. And it's really been a challenge to produce enough content to feed that beast if you know what I mean." (FII6)*

Other **strategy-related facilitating factors** included top leadership buy-in, which supports extant research both on CRM implementation (Payne & Frow, 2006; Richard, Thirkell & Huff, 2007) and marketing automation adoption, where change management and leadership have been identified as factors impacting implementation success (Mero, Tarkiainen & Tobon, 2020). Moreover, marketing and sales alignment also emerged as a key factor impacting the success of marketing automation initiatives, as described below.

> "*It's also very, very important… that sales and marketing are aligned right from the beginning. Because if that is not the case, like in our case for example, then you will have issues, then you will have really big issues".* (FII3)

Concerning **strategy-related risks,** some participants described the risk of losing focus of the key business objectives. After all, the various capabilities marketing automation solutions offer, especially related to data harnessing and analytics, can be perceived as distracting from the core business objectives. Other potential downsides were identified to include the potential over-reliance on the tool and consequently, adopting a narrow perspective of the customer journey. As the participant below suggests, understanding what to automate and when, remains a key strategic consideration that determines whether organisations can effectively harness the value of marketing automation.

> *"I guess that there is so much data out there, you could go down a rabbit hole of like constantly collecting more and trying to personalise more. And then you've mitigated the value out of automation by like you're trying to send out basically one-to-one communications and not doing anything at scale. So, that is the danger." (UKI6)*

Thirdly, with regard to the marketing automation **solution** itself, both organisational- and technological fit emerged as notable facilitating factors. **Solution-related risks** include the risk of vendors overpromising as well as the strong vendor lock-in resulting from potential difficulties with data migration and storage. The final downside of marketing automation for engagement marketing was described to be the popularity of the tool within B2B organisations, as thus, simply the use of marketing automation can no longer be considered a source of competitive advantage. This perspective is elaborated on in the comment below.

> *"Probably that everyone is doing it. Like everybody is using marketing automation, so we're not unique in that sense. And the competitive advantage needs to come from somewhere else. And, well, we understand this, but I know about companies where this has been a really hard pill to swallow. So, even if you have a perfect integration and a perfect sales and marketing process, you're taking all the consent, GDPR etc. into consideration and you're measuring everything and optimising everything, but we live in an attention economy, so everybody's doing the same as you are doing. And, you know, people become exhausted with all the content out there. There's so much available. What this has done is it has impacted our engagement rates because everybody sending emails and everybody's doing virtual events, you may not have the engagement or attendance rate you had two years ago. Because they're in other events, so you have to compete for the attention, and you have to understand how to be unique and different." (FII6)*

The comment above illustrates how marketing automation has become a mainstream digital marketing technology, especially in the B2B sector. Therefore, the question for today's B2B marketers is less about whether to use marketing automation and instead, how to best harness the tool for online engagement marketing efforts. Overall, Table 5.4 summarises the facilitating factors, risks and downsides discussed in this section. Example quotes further illustrating these findings can be found in Appendix V.

Table 5.4. Facilitating factors and downsides of marketing automation

	Facilitating factors	Risks and downsides
Resources	Staff skills and adequate training Proper set up and correct use Time, data and capital	Risk of mistakes and misuse Underutilisation and overbuying Large investment
Strategy	Overarching strategy DCM strategy Top leadership buy-in Marketing and sales alignment	Inappropriate strategy Risk of losing focus Over-reliance Narrow perspective on the customer journey
MA Solution	Organisational fit Technological fit	Vendors overpromising Strong vendor lock-in Mainstream B2B digital marketing technology

5.6. Discussion of findings

Perhaps the most compelling finding of this thesis relates to the consideration of engagement among prospective customers. After all, as highlighted in Chapter 3, existing research, despite acknowledging the presence of prospective customers (e.g. van Doorn *et al.*, 2010; Vivek, Beatty & Morgan, 2012; Lim *et al.*, 2022), has largely concentrated on post-purchase engagement (e.g., Lemon & Verhoef, 2016; Pansari & Kumar, 2017). Moreover, while the influence of current customers on prospective customers, through for example referrals has been considered (e.g. Jaakkola & Aarikka-Stenroos, 2019), this study shines the light on engagement behaviours between prospects and the organisation. Notably, the findings of this study demonstrate that engagement also occurs earlier in the customer journey, and therefore, an initial purchase is not required for engagement to develop. Thus, as online engagement behaviours have been defined as going *beyond* what is required for the transaction (van Doorn *et al.*, 2010; Jaakkola & Alexander, 2014; Jaakkola & Aarikka-Stenroos, 2019), this thesis provides a novel perspective on behavioural engagement, by considering behaviours that precede the transaction and *"go beyond"* simply what is required for the transaction to take place.

In particular, participants' characterisations of online pre-purchase engagement included descriptions of prospect involvement and voluntary resource contributions, which align with perceptions of customer engagement presented in current academic literature (Jaakkola & Alexander, 2014; Harrigan *et al.*, 2018). More specifically, examples of online pre-purchase engagement behaviours included **online interactions and consumption of digital content** as well as **starting trials, downloading samples and requesting demos**, linking pre-purchase engagement with the organisation's digital content marketing efforts. Indeed, the interview data shows strong evidence of how online B2B engagement can be fostered through digital content, furthering existing conceptual work that notes engagement as a consequence of organisational digital content marketing efforts (Hollebeek & Macky, 2019). Furthermore, these notions of engaging with the organisation's digital content accord with suggestions made by Vivek et al. (2018) on how the organisation's marketing elements, including events, self-service, product co-creation, advertising and social media activities, are all foci of customer engagement. However, again in contrast to previous examinations focused on customers, the findings of this study indicate that these connections can also occur prior to the initial purchase.

Moreover, pre-purchase engagement was noted to be purchase-oriented, where engagement enables the prospect to move forward in their buying journey. Thus, as pre-purchase engagement influences subsequent resource contributions in the prospect's path to purchase, it reinforces the connection between engagement and firm performance (via purchase) as outlined in existing literature (e.g. Harmeling *et al.*, 2017). In turn, characterisations of post-purchase engagement behaviours were consistent with previous studies on customer engagement, including **online interactions, and content consumption, service development, feedback and reviews, recommendations, referrals and other influencing behaviours** (e.g. Jaakkola & Alexander, 2014; Pansari & Kumar, 2017; Jaakkola & Aarikka-Stenroos, 2019).

With regard to engagement marketing, this study provides valuable insights into the ways marketing automation can be used to foster online engagement in B2B settings. To provide a foundation for this discussion, this study identified three primary categories encompassing the essential functionalities of marketing automation. These categories, **journey management, communications,** and **marketing insights**, build on the work by Mero *et al.* (2022), who propose sales lead management, content marketing, and customer intelligence as critical processes marketing automation can support. By considering both prospects and customers, this thesis goes beyond considering sales leads, providing more comprehensive insights into the management of customer journeys with automation. Moreover, as academic inquiry on marketing automation was noted to still be in an early stage (in section 2.7), the findings of this study provide valuable empirical insights on the use of the software tool in engagement marketing, building on previous exploration that has focused on adoption (e.g. Mero, Tarkiainen & Tobon, 2020; Mero *et al.*, 2022) and content marketing (e.g. Järvinen & Taiminen, 2016).

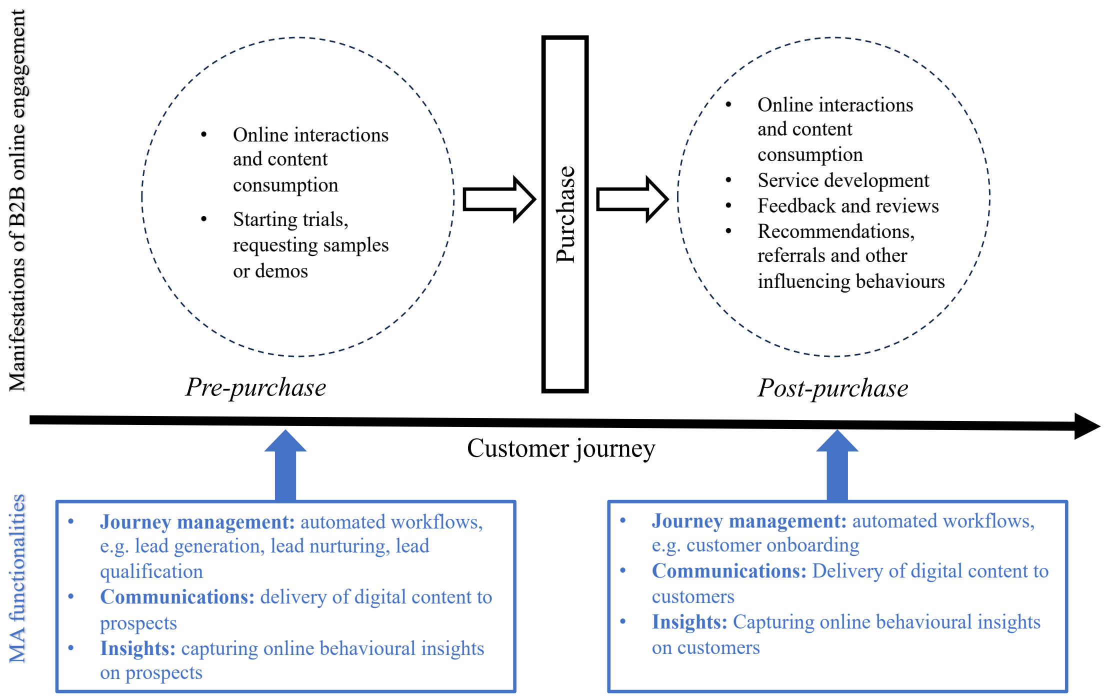
The findings demonstrate how marketing automation can be used to advance a company's engagement marketing efforts, especially through digital content management and delivery, harnessing engagement data and facilitating personalised customer journeys. While extant literature has recognised personalisation as a key element of engagement marketing (Harmeling, Moffett & Palmatier, 2018), the use of marketing automation was noted to enable personalisation at a scale, creating notable efficiencies for engagement marketing initiatives. This challenges the traditional perceptions of automation in implying standardisation (Hollebeek, Sprott & Brady, 2021) as personalised interactions can enable the creation and management of a range of outbound engagement opportunities at an efficiency that cannot be matched by manual (human) efforts.

Additionally, the findings provide evidence of machines and technologies as actors, as brought forward by Storbacka et al. (2016). After all, the participants clearly expressed how through automated processes such as being placed on customised workflows, prospects can engage with the organisation before engaging with human actors, such as marketers or salespeople. Thus, with marketing automation, organisations can both create and manage more customised touchpoints with their audiences, consequently resulting in more opportunities for prospect and customer participation, which Harmeling *et al.* (2017) have highlighted as a primary engagement marketing objective.

Moreover, the metrics used to measure online engagement were acknowledged to depend on where the prospect or customer is in their customer journey. For example, in the pre-purchase phase, website visits, newsletter subscriptions, webinar sign-ups and the number of started trials or downloaded samples were mentioned as metrics used to judge levels of engagement. In the post-purchase phase, examples of metrics included email open rates, responses to feedback surveys and the number of recommendations. Thus, the findings of the study indicate that no single measurement can effectively capture B2B online engagement, but instead, a combination of various online metrics can be used to track and measure engagement throughout the customer journey. These findings are significant, as they help marketers develop a more holistic understanding of online engagement over time, overcoming the limitations of merely relying on metrics such as likes, shares and comments on social media which have been suggested to reflect engagement with the technology or tool, rather than with the organisation (Pöyry *et al.*, 2020).

Lastly, to summarise the key findings presented in this chapter, the following figure (Figure 5.1) demonstrates the online B2B customer journey, denoting both the way engagement manifests throughout the journey and the key functionalities of marketing automation.

Figure 5.1. Illustrating the role of marketing automation and manifestations of B2B online engagement throughout the customer journey



5.7. Chapter summary

This chapter presented the findings of this thesis. These findings encompass two fundamental themes: online engagement behaviours exhibited in the B2B customer journey and the application of marketing automation in online B2B engagement marketing strategies.

Firstly, the online engagement behaviours identified in this study were discussed. These manifestations of engagement were noted to be dependent on the journey phase. In the pre-purchase phase, primary manifestations of online engagement behaviours included **online interactions and content consumption** as well as **starting trials, requesting samples or demos** while in the post-purchase phase, online engagement was noted to manifest through **online interactions and content consumption, service development**, **feedback and reviews**, and **recommendations, referrals and other influencing behaviours**. In particular, the findings related to engagement in the pre-purchase phase are significant, as extant literature has largely examined engagement that occurs post-purchase (e.g. Lemon & Verhoef, 2016; Pansari & Kumar, 2017).

Marketing automation was defined as an umbrella term for automating simple marketing actions that mostly relate to **customer journey management**, **communications** and **insights**. In the earlier phases of the B2B buying journey, before a human relationship is formed, the use of the software tool was noted to be particularly beneficial, as in that phase, the selling organisation typically has limited information about the prospect and their needs. Therefore, in this pre-purchase phase, the key functionalities of marketing automation were found to relate to gathering **insights** about the prospect and delivering digital content (**communications**) through automated workflows (**journey management**). In the post-purchase phase, the key functionalities of marketing automation were acknowledged to include facilitating the customer journey (**journey management**), maintaining **communications** (e.g. facilitating automated requests for feedback), and **gathering insights**.

Brought together, the findings of this thesis demonstrate how marketing automation can be used to foster online engagement behaviours both in the pre- and post-purchase phases of the B2B customer journey. Increased online engagement was acknowledged to result from increased involvement, enabled by more systematic, personalised, and timelier **communications** with prospects and customers through the automated delivery of digital content. In addition to this, marketing automation was acknowledged to support engagement marketing initiatives by facilitating personalised customer journeys (**journey management**) and enabling the capture of online engagement data (**insights**).

Moreover, marketing automation was acknowledged to be valuable in the measurement of engagement marketing activities, as it enables the capture and tracking of various online actions, allowing organisations to build a comprehensive understanding of engagement across the customer journey over time. By utilising this tool, organisations can assess the effectiveness of their engagement marketing strategies and make informed decisions to enhance engagement with both prospects and customers. Furthermore, key success factors related to the utilisation of marketing automation were found to relate to sufficient resources, appropriate strategy, and solution-related factors.

6. Conclusions

6.1. Chapter introduction

The purpose of this chapter is to draw together the main findings and the key contributions of the thesis. Firstly, a summary of the research is presented, followed by a discussion on the theoretical contributions of the thesis. Subsequently, the managerial implications are addressed after which a discussion on the limitations and areas for future research are presented.

6.2. Summary of research

The purpose of this thesis is to develop an understanding of the use of marketing automation for online engagement in B2B settings. Subsequently, the aim was determined as follows, *"to explore the role of marketing automation in influencing online engagement behaviours in business-to-business settings".* To reach this aim, the following three research objectives were set:

1. To explore the use of marketing automation in digital content marketing strategies targeted at B2B customer-company interactions.

2. To investigate how these online interactions fostered by marketing automation (potentially) influence B2B engagement behaviours.

3. To understand the extent marketing automation can support and advance a company's engagement marketing efforts online.

For this thesis, experienced digital marketers working both in B2B organisations across industries (n=14), and digital marketing agencies (n=15) were interviewed via Zoom between November 2020 and June 2021. The participants were based in two countries, Finland and the UK. The interviews were audio-recorded and then transcribed. Subsequently, the data was analysed following the principles outlined by Gioia et al. (2013), where first-order concepts, followed by second-order themes and finally aggregate dimensions were constructed.

As discussed in the previous chapter, the findings reveal valuable insights into both marketing automation and online engagement within the pre- and post-purchase phases of the B2B customer journey. Therefore, the contributions of the thesis can be summarised as follows. Firstly, this thesis adds to our understanding of online pre-purchase engagement and secondly, this thesis contributes to our understanding of the role of marketing automation in stimulating B2B online engagement. The implications, for both theory and practice, of these contributions will be discussed in the following sections of this chapter.

6.3. Theoretical implications

This thesis contributes to our theoretical understanding of online engagement across the B2B customer journey in automation-enhanced settings in two ways. First, the theoretical contributions to customer engagement are addressed, followed by a discussion on the theoretical contributions to the role of automation in B2B customer engagement.

6.3.1. Theoretical contributions to customer engagement

Firstly, the findings illustrate how B2B online engagement is dependent on the journey phase, and thus manifestations of engagement will be contingent on where the prospect or customer is in their customer journey. Most importantly, the findings of this study highlight engagement that occurs prior to the first purchase. By providing a characterisation of online pre-purchase engagement, this study contributes to an area in engagement research that has previously been only acknowledged (e.g. van Doorn *et al.*, 2010; Vivek, Beatty & Morgan, 2012; Lim *et al.*, 2022), but not explored in detail, as research usually considers engagement as a post-purchase phenomenon (e.g. Lemon & Verhoef, 2016; Pansari & Kumar, 2017). Moreover, the findings illustrate pre-purchase engagement as being purchase-oriented, manifesting through online resource investments –such as consumption of digital content– that aid the prospect in moving forward in their customer journey. Thus, by highlighting the importance of establishing engagement in earlier phases of the journey, this study responds to calls on research by Lundin and Kindström (2023) on how customers transition across different touchpoints in digitalised B2B customer journeys.

Consequently, this thesis contributes to engagement research by extending our theoretical understanding of B2B engagement behaviours to also occur prior to the initial purchase.

6.3.2. Theoretical contribution to the role of automation in B2B customer engagement

Secondly, this thesis contributes to engagement marketing literature by providing new insights into the role of marketing automation in stimulating B2B online engagement behaviours throughout the customer journey. This insight is important as academic research on marketing automation has not kept pace with practitioner insights.

As acknowledged in Chapter 2, empirical investigations are scarce, with only a few notable exceptions. For instance, Järvinen and Taiminen (2016) delved into its application within B2B content marketing, Mero, Tarkiainen and Tobon (2020) focused on managerial reasoning during the adoption and Mero *et al.*(2022) conceptualised an agile implementation approach for SaaS offerings in the context of marketing automation. Moreover, the use of automation has been only briefly referenced in studies examining digital content marketing (e.g., Terho *et al.*, 2022) and AI-empowered tools for journey management (e.g. Rusthollkarhu *et al.*, 2022). Nonetheless, before this thesis, comprehensive insights and focused inquiry into the role of marketing automation in enhancing B2B engagement were lacking. Consequently, by articulating an approach for marketing automation in B2B engagement marketing, this thesis fills an important gap in our understanding.

Figure 5.1 (p.122) depicts this theoretical contribution by illustrating how marketing automation fosters B2B online engagement. By visualising these connections between marketing automation and online engagement in this theoretical framework, we highlight the role of automation in B2B customer management. This strategic utilisation of marketing automation enables organisations to create, manage, automate and capture more touchpoints in the journey, consequently resulting in more personalised opportunities for both prospects and customers to engage with.

In addition, this thesis provides insights into how marketing automation can be utilised to drive engagement with the focal organisation before human relationships are even formed, which strengthens ideas brought forward by Storbacka *et al.* (2016) on the inclusion of technology as an actor. After all, the use of marketing automation was noted to increase flexibility, and consequently reduce the reliance on human relationships in fostering engagement, especially in the early stages of the customer journey, when the selling organisation has limited information about the prospect and their needs. Through this, the thesis responds to previous suggestions for research on ways technology can be harnessed to drive engagement (Ng, Sweeney & Plewa, 2020) as well as research on tools that facilitate interactions for engagement (Harmeling, Moffett & Palmatier, 2018).

Additionally, the thesis provides insights into the ways B2B online engagement can be captured and measured, which aids in the creation of effective engagement marketing efforts. The findings illustrate how the data-gathering abilities of marketing automation solutions enable harnessing insights on engagement with prospects and customers which facilitates organisational learning. For example, by gaining insights into the customer journey, organisations can assess which types of digital content are deemed most interesting by prospects and customers. After all, engagement data has been acknowledged to provide a more accurate perspective of customer value to the organisation, consequently influencing strategic decisions related to for example targeting or key account management (Harmeling, Moffett & Palmatier, 2018). Therefore, marketing automation can be noted as a key tool for collecting and analysing engagement data, informing future engagement marketing strategies.

As engagement marketing continues to evolve, understanding its theoretical underpinnings becomes increasingly crucial. By developing an understanding of the ways through which marketing automation impacts B2B customer management, this thesis provides insights into how businesses can leverage technology to foster deeper connections with their customers. Specifically, through the creation of Figure 5.1, it sheds light on the ways in which automated touchpoints influence customer engagement behaviours and enhance the overall effectiveness of engagement marketing strategies. This visualisation not only advances our understanding of engagement marketing in the digital age but also highlights the strategic use of automation in B2B customer management.

The following table (Table 6.1) summarises the theoretical contributions described in this section and presents them together with the managerial implications and future research questions emerging from the findings of this thesis.

Table 6.1. Conclusions

Summary of contribution	**Managerial implications**	**Future research questions**
1. Characterisation of B2B pre-purchase engagement in online settings.	• Manifestations of online engagement behaviours are dependent on the journey phase. • Managers should consider digital content and trials as ways to foster engagement in the pre-purchase phase. • Prospects are engaging with the organisation before humans (e.g. salesperson) are involved.	• How does pre-purchase engagement contribute to purchases? • Can the value of individual touchpoints in the customer journey for driving engagement be mapped? • What does pre-purchase engagement look like in other settings, e.g. B2C or C2C? • How does the valence and intensity of pre-purchase engagement affect outcomes? • What are the customer perceptions of pre-purchase engagement?
2. Theoretical framework illustrating the role of marketing automation in B2B customer engagement	• Findings illustrate clear benefits for employing marketing automation for B2B engagement marketing initiatives. • Marketing automation can be beneficial in both stimulating and capturing online engagement. • Facilitating factors impacting the success of marketing automation for engagement marketing were outlined.	• What are the customer perceptions of automation-driven online engagement? • How can engagement behaviours outside of the scope of marketing automation software be captured and analysed?

6.4. Managerial implications

In relation to the first contribution to understanding B2B pre-purchase engagement in online settings three key implications for managers emerge.

Firstly, behavioural manifestations of online engagement were found to vary depending on the phase of the customer journey. This highlights the significance of considering the specific phase of the customer journey when designing and assessing the value of different digital touchpoints. By considering how engagement behaviours evolve throughout the journey, organisations can strategically optimize their digital interactions to effectively engage both prospects and customers at each phase. Therefore, these findings provide valuable insights for managers seeking to design effective customer journeys and evaluate the effectiveness of digital touchpoints, in order to enhance their overall customer engagement strategies.

Specifically in the pre-purchase phase, both digital content and other online interactions as well as offering trials, demos and samples emerged as valuable ways to engage with prospects. Indeed, the findings show strong evidence of how online B2B engagement can be fostered through digital content, furthering existing conceptual work that notes engagement as a consequence of organisational digital content marketing efforts (Hollebeek & Macky, 2019). After all, the provision of digital content represents a way to drive prospect involvement and subsequent voluntary resource contributions, which align with existing perceptions of behavioural engagement.

Furthermore, the findings revealed that prospects engage with the selling organisation even before humans (e.g. marketers or salespeople) are involved. This highlights the significance of digital touchpoints and the potential impact of automation-enabled online engagement in the early phase of the customer journey. Additionally, pre-purchase engagement was found to be purchase-oriented, emphasising the significance of utilising engagement to facilitate and encourage prospects' progress in their buying journeys.

With regard to the second contribution on the role of marketing automation in stimulating B2B online engagement, there are three implications for managers.

Firstly, the findings of the thesis illustrate clear benefits of employing marketing automation for B2B engagement marketing initiatives. This thesis suggests that the core functionalities of marketing automation relate to communications, marketing intelligence and journey management. Moreover, the use of marketing automation enables the creation of more personalised and thus compelling customer journeys. Additionally, the automatic pre-determined actions contribute to improved responsiveness, while the ability to track online behaviours can be used to create timely and personalised messages. In particular, the ability to personalise communications at a scale can be acknowledged as a key feature for engagement marketing. This challenges the traditional perceptions of automation in implying standardisation (Hollebeek, Sprott & Brady, 2021) as personalised interactions can enable the creation and management of a range of outbound engagement opportunities at an efficiency that cannot be matched by manual (human) efforts.

In addition to utilising marketing automation for stimulating engagement, the software tool can be used to capture insights on both prospect and customer engagement throughout the complex B2B journeys. Moreover, the findings of this thesis illustrate that no single metric can effectively capture B2B online engagement, but rather a combination of online metrics across the customer journey should be used to build an understanding over time. In this process, marketing automation was noted to be particularly valuable, as today's marketing automation solutions typically offer a vast range of metrics that organisations can use to evaluate online engagement. Therefore, by harnessing a range of online metrics offered by marketing automation solutions, organisations can build a more holistic understanding of levels of engagement with their audiences. Such approaches can overcome the limitations related to relying on more superficial measures associated with engagement, such as merely counting the number of likes on a social media post.

Thirdly, the thesis also outlined various factors that facilitate the success of marketing automation -driven B2B engagement marketing initiatives. These insights were grouped into three categories: resource-related factors, strategy-related factors and solution-related factors (e.g. technological fit). With regard to resources, the participants often reiterated that a lot of manual work goes into the effective use of marketing automation, through for example planning workflows, creating templates, producing content, and selecting channels. Because of this, having staff with the right skills and providing adequate training for the use of marketing automation is imperative. Indeed, insufficient skills can be acknowledged as a key business risk, as they are often correlated with the risk of mistakes and misuse. While the results of the thesis indicate clear benefits for using marketing automation, the key success factor lies in the "*how*" the software tool is used for B2B engagement marketing. This emphasises the need to consider marketing automation as a resource that supports human efforts rather than replaces them, enabling marketers to spend more of their time on strategic tasks rather than on the often simple and repetitive actions associated with the execution of digital campaigns.

6.5. Limitations and recommendations for future research

This study advances our understanding by exploring the principles of B2B online engagement in automation-enhanced settings. As illustrated in Table 6.1, from these findings, several questions for future research emerge. In this section, first, the limitations and recommendations for future research stemming from the first contribution on B2B online pre-purchase engagement are addressed, followed by a discussion on the limitations and future research avenues related to the second contribution on marketing automation-driven engagement marketing.

This thesis focused on exploring B2B online engagement at the pre- and post-purchase phases of the customer journey. By focusing on engagement prior to the purchase, the thesis challenges the common focus on engagement behaviours occurring *"beyond"* the transaction (van Doorn *et al.*, 2010). To build on these insights, future work could explore engagement in the purchase phase, as it would allow for the development of a detailed understanding of engagement throughout the customer journey. With regard to pre-purchase engagement, future studies could consider purchase data when exploring ways engagement develops in the B2B customer journey. Utilising such data could provide valuable insights to pre-purchase engagement, allowing organisations to tailor their engagement marketing efforts to those who represent the most potential for future purchases. Thus, a further study could assess the connection between pre-purchase engagement, engagement marketing efforts, and actual purchases, developing our understanding of the value, as well as return on investment of pre-purchase engagement marketing. Moreover, future work could map the value of different digital touchpoints in the customer journey, which would help optimise engagement marketing initiatives.

Additionally, these findings can be used as a basis for further exploration of pre-purchase engagement. For example, future work could consider expressions of such engagement in other settings, e.g. in B2C. Moreover, to provide more insights to pre-purchase engagement, the valence and intensity of such engagement could be considered. After all, this study remained rather focused on the positive outcomes of engagement. Therefore, future research could address negative outcomes of engagement (e.g. negative actions such as complaints or prospect inactivity) as these insights could be useful in providing a more balanced discussion on engagement marketing. Such exploration could help identify and assess any potential negative consequences of online engagement throughout the customer journey.

Moreover, this thesis focused entirely on the seller's perspective of online engagement. Thus, future research could address engagement from the customer's and prospective customer's perspective. Such work would provide valuable insights into what customers perceive as engagement, as well as insights into what motivates them to engage with an organisation. Additionally, future research on how both prospects and customers perceive engagement when it is driven by technologies such as automation, rather than humans, should be welcomed, as these insights would further our understanding of the role of machines and technologies as actors, as initially proposed by Storbacka *et al.* (2016). These insights could help organisations determine which touchpoints should, and moreover should not be automated in complex B2B journeys, providing valuable insights into where a human touch is needed.

Building on these suggestions, as AI-driven tools, such as chatbots (e.g. ChatGPT) are rapidly becoming more mainstream, future research should consider the emerging need for *"social contracts"* or customer cues for what is acceptable to be automated or created by AI. Future research should consider the potential unintended consequences of automated communications, as well as the customer acceptance of such communications. For example, should customers be informed when they are interacting with a non-human actor? Therefore, customer perceptions of automation-driven online interactions represent an important area for future engagement marketing research.

Continuing with limitations and future avenues for the second contribution on marketing automation-driven engagement marketing, the following observations can be made. Firstly, due to the focus on online engagement, digital customer journeys and marketing automation, the digital maturity of both the focal organisations and their clients impact the perceived relevance of the findings of this thesis. Secondly, when exploring marketing automation, this thesis focused on marketing automation solutions available on the market, (e.g. HubSpot, Marketo) and did not assess automation tools developed internally by B2B organisations. Consequently, there may be functionalities of internally developed marketing automation solutions that impact online engagement in ways that this thesis was unable to consider.

Lastly, while this study succeeded in identifying a number of key behavioural manifestations of online engagement, extant literature has acknowledged that manifestations are context-driven (Brodie *et al.*, 2011). Therefore, to provide deeper insights into online engagement behaviours, future research could explore online engagement that cannot be captured with marketing automation solutions. Examples of such include actions that go beyond what online analytics are effectively able to capture, such as taking a screenshot of a blog post, or saving digital material for later, or offline actions such as word of mouth. Related to this, future research could consider engagement that occurs before the marketing automation system is able to identify the prospect (based on their IP address). Among practitioners, such touchpoints outside of the scope of analytics trackers have recently been referred to as the dark funnel. For researchers and practitioners alike, these touchpoints represent an interesting area for future inquiry.

6.6. Conclusion

This chapter brought together the main findings and the key contributions of the thesis. Firstly, this chapter commenced with a summary of research, which outlined the aim of the study on *exploring the role of marketing automation in influencing online engagement in B2B settings*. Through 29 in-depth interviews with experienced digital marketers, the thesis explored the impact of utilising marketing automation in digital content marketing efforts, assessing whether these automation-driven interactions can impact online engagement behaviours, and consequently, the ways marketing automation can be harnessed for B2B engagement marketing. From this exploration, two key contributions emerged. Firstly, the findings of the study extend our understanding of B2B engagement behaviours by considering online engagement that occurs prior to the first purchase. Secondly, the findings contribute to our understanding of the role of marketing automation in both stimulating and capturing B2B online engagement across the customer journey, improving our understanding of automation-driven engagement marketing practices. In this chapter, the theoretical contributions of this thesis were discussed after which the managerial implications and both the limitations and areas for future research were presented.

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Appendices

Appendix I: Definition of CRM

Authors	Definition of customer relationship management (CRM)
Grönroos (2000, p.viii)	"It should be noted that customer relationship management (CRM) is not treated in the narrow sense here, which is often the case in the field of information technology. Instead, it is used to describe how the whole relationship between a firm and its customers, with all its various contacts, interactive processes and communication elements, is managed. In this way CRM is viewed more or less as a synonym to relationship marketing."
Xu *et al.* (2002, pp.442-443)	"CRM is an information industry term for methodologies, software, and usually internet capabilities that help an enterprise manage customer relationships in an organised way… CRM is also defined as an all-embracing approach, which seamlessly integrates sales, customer service, marketing, field support and other functions that touch customers."
Chen & Popovich (2003, p.672)	"Customer relationship management (CRM) is a combination of people, processes and technology that seeks to understand a company's customers. It is an integrated approach to managing relationships by focusing on customer retention and relationship development."
Fjermestad & Romano (2003, p.574)	e-CRM is the "combination of hardware, software, processes, applications and management commitment"
Reinartz, Krafft & Hoyer (2004, p.295)	"Thus, our view of the CRM process entails the systematic and proactive management of relationships as they move from beginning (initiation) to end (termination), with execution across the various customer-facing contact channels."
Zablah, Bellenger & Johnston (2004, p.480)	"CRM is an ongoing process that involves the development and leveraging of market intelligence for the purpose of building and maintaining a profit-maximising portfolio of customer relationships."
Boulding *et al.* (2005, p.157)	"Specifically, CRM relates to strategy, the management of dual creation of value, the intelligent use of data and technology, the acquisition of customer knowledge and the diffusion of this knowledge to the appropriate stakeholders, the development of appropriate (long-term) relationships with specific customers and/or customer groups, and the integration of processes across the many areas of the firm and across the network of firms that collaborate to generate customer value."
Payne & Frow (2005, p.168)	"CRM is a strategic approach that is concerned with creating improved stakeholder value through the development of appropriate relationships with key customers and customer segments. CRM unites the potential of relationship marketing strategies and IT to create profitable, long-term relationships with customers and other stakeholders. CRM provides enhanced opportunities to use data and information to both understand customers and cocreate value with them. This requires a cross-functional integration of processes, people, operations, and marketing capabilities that is enabled through information, technology and applications."
Richard, Thirkell & Huff (2007, p.424)	"In essence the practice of CRM can be concisely defined as using the appropriate level of technology to help manage relationships with customers to the mutual benefit of stakeholders."

Gummesson (2008, p.7)	"CRM is the values and strategies of RM [Relationship Marketing] -with special emphasis on the relationship between a customer and a supplier- turned into practical application and dependent on both human action and information technology."
Greenberg (2010, p.413)	"CRM 2.0 is a philosophy and business strategy, supported by a system and a technology, designed to engage the customer in a collaborative interaction that provides mutually beneficial value in a trusted and transparent business environment. It's the company's response to the customer's ownership of the conversation."
Hoffman & Bateson (2011, p. 256)	"The process of identifying, attracting, differentiating, and retaining customers, where firms focus on their efforts disproportionately on their most lucrative clients."
Khodakarami & Chan (2014, p.27)	On CRM Systems: "Customer relationship management (CRM) systems are a group of information systems that enable organisations to contact customers and collect, store and analyse customer data to provide a comprehensive view of their customers. CRM systems mainly fall into three categories: operational systems (used for automation and increased efficiency of CRM processes), analytical systems (used for the analysis of customer data and knowledge), and collaborative systems (used to manage and integrate communication channels and customer interaction touch points)
Buttle & Maklan (2019, p.17)	"CRM is the core business strategy that aims to create and maintain profitable relationships with customers, by designing and delivering superior value propositions. It is grounded on high-quality customer-related data and enabled by information technology"
Kotler, Armstrong & Balasubramanian (2023, p.145)	"Managing detailed information about individual customers and using that information to carefully manage customer touchpoints to maximise customer loyalty."

Appendix II: Interview Guide

Research Aim	Research Objectives	Links to Literature	Interview Questions	Follow-up questions	Themes
"To explore the role of marketing automation in influencing online engagement behaviours in business-to-business settings".	1. To explore the use of marketing automation in digital content marketing strategies targeted at B2B customer-company interactions.	**Best practice digital content marketing** (Holliman & Rowley, 2014) **Marketing automation and B2B content marketing** (Järvinen & Taiminen, 2016)	1. What digital channels (if any) does your organisation utilise to communicate with your prospective and existing customers?	• Could you give examples of the type of digital content created and shared online by your organisation?	Customer-company interactions
			2. How would you describe the online interactions between your organisation and its customers?	• How frequently does your organisation share digital content? • How would you describe the depth of these interactions? Would you describe them as meaningful from the organisations point of view? • How would you describe the valence (positive, neutral, negative) of these interactions?	
			3. Does your organisation have a digital content marketing strategy in place?	• What type of content resonates well with your customers? • How is the success of your digital content strategy measured? • How do you feel about your current content marketing strategy?	Use of digital content marketing
			4. What type of technology or digital tools does your organisation use to carry out digital content marketing strategies?	• Does your organisation use any CRM tools? • Does your organisation use any form of marketing automation? For example: o automated email marketing, o customer behaviour tracking, o workflow automation	
			5. Can you tell me about your experience with marketing automation?	• How long have you used it for? (you / your organisation) • What is marketing automation utilised for in your organisation? • What were the motivations behind the adoption of marketing automation software? • Have you experienced any challenges related to the use of marketing automation?	Use of marketing automation

	2. To investigate whether these online interactions fostered by marketing automation can influence B2B engagement behaviours.	**Digital content marketing fostering consumer engagement** (Hollebeek & Macky, 2019) **Fostering brand engagement through digital content marketing** (Taiminen & Ranaweera, 2019) **Engagement behaviours** (van Doorn *et al.*, 2010; Jaakkola & Alexander, 2014)	6. How does your organisation interact with the customer during the customer journey?	• How much of the customer journey typically takes place online? • How about offline? • Would you describe your customers as being engaged with your organisation? • How committed would you describe your customers to your organisation?	Perceptions of customer engage-ment
			7. How do customers engage with your organisation?	• Do your customers engage in online conversations about your organisation or brand? • Do you receive feedback from your customers? • Are your customers involved with service development such as testing new features or offerings? • Do your customers write reviews or provide referrals for your organisation? • Are your offerings customised or adapted for the customer?	
			8. How would you describe the benefits of customer engagement for your organisation?	• Are engaged customers more satisfied? • Are they likely to purchase more from your organisation? • Are engaged customers more profitable? • Are engaged customers more likely to share information with the organisation? • Have you noticed any other benefits arising from engaged customers?	
			9. Does your organisation track or measure customer engagement?	• How is customer engagement measured? • What parameters are used? • Where in the customer journey would you say engagement is most prominent? • Are you satisfied with the current levels of customer engagement? If not, how could customer engagement be improved?	
			10. Does your organisation utilise any strategies or tactics that aim to boost customer engagement?	• How would you describe the role of technology / digital tools in boosting engagement?	Engage-ment marketing

	3. To understand the extent marketing automation can support and advance a company's engagement marketing efforts online.	**Engagement marketing** (Harmeling *et al.*, 2017) **Use of technology to enhance B2B customer engagement** (Grossberg, 2015b)	11. Do you think there is any relationship between your use of marketing automation and customer engagement?	• Has the use of automation impacted any of the following manifestations of engagement: e.g. customer reviews, referrals, customer commitment, customer involvement, customer feedback (see Obj.2 Q.2) • Has the use of marketing automation software, in your perspective, influenced customer engagement at different stages of the customer journey? For example, lead generation, lead scoring, conversion and follow-up. • From your perspective, has the use of marketing automation had an impact on the overall customer relationship?	Marketing automation & engage-ment
			12. How can marketing automation be best harnessed by B2B organisations to make the best use of the software tool for engagement marketing purposes?	• What would you describe to be the optimal use of automation in customer-company interactions? • Do you think marketing automation software is used to its full potential in your organisation? • Does the use of marketing automation help boost your organisation's digital content marketing efforts? • Does the use of marketing automation affect levels of customer engagement in your organisation? If so, why?	
			13. Are there any facilitating factors that impact the success of applying marketing automation application for engagement marketing purposes in a B2B organisation?	• How much training is required to learn to effectively utilise marketing automation? • Is marketing automation software utilised and maintained in-house or through an external organisation, such as a marketing consulting agency? • What resources need to be devoted (such as time, capital, staff) to successfully adopt marketing automation? • What resources are required to harness marketing automation	Engage-ment marketing

				for digital content marketing? • Are there any barriers to adopting marketing automation for an organisation? • Can you think of any downsides for the organisation that can stem from the use of marketing automation for B2B digital content marketing?	

Appendix III: Participant Information Sheet

Name of department: Department of Marketing

Title of the study: Exploring the role of marketing automation in fostering online engagement in business-to-business settings

Introduction

My name is Sissi Lehto, and I am a doctoral student in the Department of Marketing at the University of Strathclyde, Glasgow, UK. I am conducting this research as a part of my doctoral dissertation.

What is the purpose of this investigation?

The main objective of the investigation is to explore the use of marketing automation software for digital marketing purposes and determine the tool's abilities in fostering customer engagement within a business-to-business setting. Here, customer engagement refers to customer behaviours targeted at a firm or a brand, that go beyond the transaction and stem from the customer's own motivations rather than the firm's (Brodie et al., 2016). Examples of engagement include writing reviews, referrals or participating in conversations related to the brand or organisation on social media. Current academic literature in the field of marketing has not yet explored the potential of novel technologies, such as marketing automation in fostering customer engagement in a business-to-business setting. The investigation will aim to answer the following questions:

- How does the utilisation of marketing automation in digital content marketing influence interactions between B2B organisations and their audience? E.g. Is the frequency of interactions affected?
- In what ways do these interactions stimulated by automation impact customer relationships?
- In what ways, can marketing automation software impact customer engagement at different stages of the customer journey? Stages can include for example lead generation, lead qualification, conversion and follow-up.
- How can marketing automation be best harnessed by B2B organisations to make the best use of the software tool for engagement marketing purposes? And,
- What are the potential facilitating factors that impact the success of applying marketing automation application for engagement marketing purposes in a B2B organisation?

Do you have to take part?

The study will involve interviews asking about your experiences with marketing automation software. I will be asking about your experiences with marketing automation in relation to driving new business and retention rates. I will also be asking about the way utilising marketing automation affects the engagement levels of your customers. Additionally, I will ask you to explain how you perceive the potential of this marketing tool in the future.

Participation in this study is voluntary and you can refuse to participate or withdraw without any detriment. Refusing to participate or withdrawing participation will not affect any other aspects of the way you are treated.

What will you do in the project?
The interview will be held at a mutually agreed upon time and place, such as online via Zoom or possibly face-to-face in a public setting (e.g. café or an office). Face-to-face interviews will only be conducted after the lockdown related to the COVID-19 pandemic has eased and the national health and safety restrictions permit to do so. The interview should take approximately an hour. You do not need to undertake any preparation and questions can be sent to you in advance if you wish.

Why have you been invited to take part?
You have been invited to participate in this research as you are a digital marketing professional working with marketing automation in an organisation operating in the B2B sphere, in either the UK or Finland.

What are the potential risks to you in taking part?
There are no risks regarding your participation.

What happens to the information in the project?
Your information will be kept confidential, and all data will be destroyed on final completion of the doctoral dissertation.

The University of Strathclyde is registered with the Information Commissioner’s Office who implements the Data Protection Act 1998. All personal data on participants will be processed in accordance with the provisions of the Data Protection Act 1998.

Thank you for reading this information – please ask any questions if you are unsure about what is written here.

What happens next?
If you are happy to be involved in the project, you will be asked to sign a consent form to confirm this. This will not be attached to the information in your interview and will be kept confidentially in a separate location.

If you do not want to be involved in this project, you will not be asked to sign the consent form. I would like to thank you for your attention.

The results of this study will be published in a doctoral dissertation. Parts of the study may be published in subsequent journal articles.

Researcher contact details:
Should you need to contact me my email address is sissi.lehto@strath.ac.uk

Chief Investigator details:
My supervisor is the chief investigator of this study: Dr. Matthew Alexander. Should you have any queries or concerns please do not hesitate to contact him at matthew.j.alexander@strath.ac.uk

This investigation was granted ethical approval by the Marketing Departmental Ethics Committee.

Consent Form

Name of department: Department of Marketing
Title of the study: Assessing the impact of marketing automation on customer engagement in a Business-to-Business setting

- I confirm that I have read and understood the information sheet for the above project and the researcher has answered any queries to my satisfaction.
- I understand that my participation is voluntary and that I am free to withdraw from the project at any time, up to the point of completion, without having to give a reason and without any consequences. If I exercise my right to withdraw and I don't want my data to be used, any data which have been collected from me will be destroyed.
- I understand that I can withdraw from the study any personal data (i.e. data which identify me personally) at any time.
- I understand that any information recorded in the investigation will remain confidential and no information that identifies me will be made publicly available.
- I consent to being a participant in the project
- I consent to being recorded as part of the project

(PRINT NAME)	
Signature of Participant:	Date:

Appendix IV: Sample of coding

Combine the right theme with the quote. Note that the quote can contain multiple themes. Themes: 1) Insights, 2) Communications and 3) Journey management (e.g. lead gen, nurturing, workflows).

Theme(s)	Example quotes
	"Marketing automation is about putting systems and processes in place to make your marketing more efficient. So, you are creating message flows and communication flows that are triggered-based to help you tell a consistent story that is relevant to that person, at a particular point in that their customer lifecycle. It's about creating efficiencies in your marketing operations." (UKA3)
	"And I think that if I was to explain marketing automation, I would say it's a tool which can allow you to have regular, consistent, monitored, reporting and campaign communications with a client base." (UKA4)
	"So, we know, if you're drawing out a map of saying right, if a customer acts as, you know, downloading content item A, B and C, in the sequence like that, then ideally, what you should be doing is using your MA (marketing automation) platform to sort of drip feed that information anyway to the customer in the appropriate time. So, that, you know, once they become a customer, then you say right actually you bought the product, you should be reading this document now, then a week later, another document and a week later, so that's the way you build that capability. (UKI1).
	"Oftentimes, we think about marketing automation being really email focused. It could be something else as well. It could be basically a call, it could a SMS message. It could be a push message. It could be a direct message in some other service. But I think that the core is that there's some kind of like specified trigger that activates the messaging or their communication or the marketing activity." (FIA2)
	"*Ultimately, one of the things that marketing automation technology gives us is the ability to impact the buyer journey, the customer journey beyond that kind of, depending on what stats you read, 70 to 90 percent of the research is done before a salesperson gets involved. Marketing automation technologies allow us to see that activity. And hopefully, if we've got it set up correctly, we can look at what people are doing. We can see that they are going through our customer journey. They are filling out a form. Right, they've filled out form. What have we sent them? What are the pages that we've done? They then need to look at that from a persona and a customer journey point of view to then really build out that proper understanding." (UKA6)*

Appendix V: Quotes illustrating the facilitating factors, risks and potential drawbacks of marketing automation

Facilitating factors	Quote
Staff skills and adequate training	*"Marketing automation is definitely a tool that requires a very specific kind of expertise and this kind of digital technical mindset. So, it's not as simple as just tracking and dropping and then sending stuff. So, you need to understand the tool, you need to understand the marketing automation concept, and you need to understand digital marketing. And that has been a challenge for us because we have a lot of marketers in the regions, but not everyone is able to learn marketing automation or has the time for it." (FII6)*
Proper set up and correct use	*"Well, it really easily gets very complex if you don't have a persistent approach. The typical way how companies start using the system is that they start creating workflows, creating workflows, creating workflows and the end result is that no one has any understanding on what is happening, what is automated, what is leaving automatically, triggered out of the system, and that is a very scary situation. When you realise that no one has control or the understanding for what the system does." (FIA8)*
Time, data and capital	*"And I don't think people realise the amount of upfront time and investment that is required to create a particular customer flow, or automation flow. It really does require a lot of investment up front in terms of time" (UKA3)*
Overarching strategy	*"But, for example, like I think quite many companies make that mistake of thinking, like, OK, we will switch to this marketing automation platform or take a new tool into use, and that will solve all of my problems. And that's the wrong way to think about it. First, you need to know what you want to do and how you want to do it. And then you can use technology to sort of amplify that thinking." (FII8)*
DCM strategy	*" If you haven't got, as we discussed earlier, if you haven't got a clear content strategy, then you're doing this the wrong way round." (UKI3)*
Top leadership buy-in	*"Personally, I think that whole ownership issue needs to sit under the chief revenue officer's leadership. Because, at the end of the day, the chief revenue officer is looking at what happens in terms of the different phases, that we talked about, sort of, acquisition, engagement and retention, right. And those are the distinct to, so if it falls under that CRO function, then you know it requires an executive sponsorship and leadership and ownership as well. And once it does that, then it's fine. Now what you're finding is MA platforms belong to the CMO and the CRM systems belongs to the chief sales officer. Whereas you could argue that, or indeed the CEO takes on that executives stakeholdership and ownership and says right you've got to be working on the one platform with the one system, even though there are two distinct things, they're actually integrated so tight that you can't divorce the two." (UKI1)*
Marketing and sales alignment	*"Other problems are usually are related to if sales are not involved in the use of marketing automation. This is something that I've been saying a lot. I actually think that marketing automation should be a tool for sales and maybe the company should consider how well the marketing and sales departments are working together. That's something that always bounds bad for the project if sales is very far from the marketing side and they don't see the natural connection of things. And if the sales culture is not ready for the marketing automation to be put in place. I usually say to clients that we need to have your head of sales involved in this project, otherwise it will not fly within the company. We might be able to do a few campaigns, but after that, it kind of like withers out. You don't have the money to run it. And if you don't get feedback from the sales, you can't optimise the marketing automation any further." (FIA6)*

Organisational fit	*"If the business is fit otherwise. I cannot see any other than mental issues, that the culture is not fit with digital overall, so you don't have a website. Those barriers are there that your environment is not ready." (FIA1)*
Technological fit	*"So, risks are probably around not doing due diligence and choosing the wrong platform for what you need. Whether that's because you've got a different tech stack or you've not thought about your internal processes and therefore just pushed something on that doesn't fit. So, you could invest a lot of time and money and have to throw it away and re-do it again when you switch out." (UKA6)*
Risks and downsides	**Quote**
Risk of mistakes and misuse	*"Another risk is to just turn your marketing to a glorified spam machine or newsletter machine, which should never be the case, but it is easy to end there. So, the fact that now you have a marketing automation platform, you have a huge ass megaphone, doesn't mean that you should shout to everybody. So, getting overly enamoured with scale rather than other metrics in communications, it's a risk." (FII2)*
Underutilisa-tion and overbuying	*"The other classic case probably is that say, you use your marketing automation tool mainly for emails, so, email delivery. And really just kind of as a delivery vehicle without having then factored in much of actual targeting or a bit of a sequential messaging, let alone this being kind of behaviourally driven and targeted based on customer behaviour and so on." (UKI2)*
Large investment	*When you first start adopting it, it would be probably money because after the initial investment, you also need to build the system architecture and you need to do the integrations. You need to probably create new templates and campaign templates and in Europe consent management, because of GDPR. So, that's just to set everything up. And then, of course, then we can move to training and then we can move to utilisation." (FII6)*
Inappropriate strategy	*"But if you use the marketing automation like traditional mass marketing, like email marketing, same content to it to all your customers, I think it would be better to send nothing than to send the same message to every person. So, you can do much harm with marketing automation if you don't put effort in planning strategies and tactics." (FIA3)*
Risk of losing focus	*"I guess that there is so much data out there, you could go down a rabbit hole of like constantly collecting more and trying to personalise more. And then you've mitigated the value out of automation by like you're trying to send out basically one-to-one communications and not doing anything at scale. So, that is the danger." (UKI6)*
Over-reliance	*"Overreliance on it, potentially. So, if you've got, and you know, what do you do without it? If you've got a sales team or a marketing team that's so ingrained in using it, the sales guys will turn up in the morning and just go through their tasks. They won't think outside the box and actually think about what their job and purposes is and that this is a tool. They will only do what the CRM has told them to do for today or what the marketing automation tool has said today, rather than like taking a situation, maybe a marketing manager or content manager might say, well, what's today's post going to be? Rather than actually there's something here that warrants 20. We won't think away from that, like we do one. So, I feel like sometimes the risks are that you either become too reliant on it or that's your space that you live in, and actually the real world of your business and maybe things you have to change become second place. When actually I think that the power comes from live in this world here, and then always relate back to how that marketing automation can amplify or speed up or make it more effective to what you want to do. So, it's trying to keep it as a tool and not owning you." (UKI5)*

Narrow view of the customer journey	*"Yeah, I think it probably would drive, I don't know how to phrase it, but it would drive a very narrow view of what the customer journey or the customer experience could and should look like. Because it just becomes this engine that you, fictitiously pump people into and through. So, I think a big negative for me would be that tendency for it to make businesses and marketing teams very narrow minded. I think it produces a lot of data and information, much of which is useful, much of which isn't and can be quite distracting."(UKA1)*
Vendors overpromising	*"We know that the software vendors have some really strong, capable sales teams and the salesperson will tell the client it can fix all of their problems. And very often it cannot. And I think that's where we see grumpy clients coming to us who were sold an amazing vision of just how wonderful this tool could be, and it will never live up to those expectations. So, it's again, it's kind of re-setting what it can do, what they are going need to additionally invest to that point as well." (UKA4)*
Strong vendor lock-in	*"These are very expensive tools, all of them. So, once you buy it, your hands are quite tight and the vendor can do whatever the hell they please, in a sense. If they don't update the software, you will still use it because a migration is an enormously painful process. Which also means that for a year you don't develop anything, you just kind of migrate. So, the vendor lock-in is very, very strong." (FII2)*
Mainstream B2B digital marketing technology	*"Probably that everyone is doing it. Like everybody is using a marketing automation, so we're not unique in that sense. And the competitive advantage needs to come from somewhere else. And, well, we understand this, but I know about companies where this has been a really hard pill to swallow. So, even if you have a perfect integration and a perfect sales and marketing process, you're taking all the consent, GDPR etc. into consideration and you're measuring everything and optimising everything, but we live in an attention economy, so everybody's doing the same as you are doing. And, you know, people become exhausted with all the content out there. There's so much available. What this has done is it has impacted our engagement rates, because everybody sending emails and everybody's doing virtual events, you may not have the engagement or attendance rate what you had two years ago. Because they're in other events, so you have to compete for the attention, and you have to understand how to be unique and different." (FII6)*