LAPPEENRANTA UNIVERSITY OF TECHNOLOGY

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MASTER'S THESIS

A Framework for Understanding the Usage of the Customer Journey in Marketing Automation

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ABSTRACT

Focusing on customer experience has been identified as a key driver of both competitive advantage as well as customer acquisition and retention. The customer journey concept has emerged as one of the most prominent service design methodologies for defining and assessing customer experience. Most often customer experience occurs when customers interact with a company's marketing output. Marketing automation, i.e. the automated process of delivering personalized and timely content to customers by utilizing both technology and processes, has emerged as a significant means for managing these touchpoints, as well as the paths of customers as they transition from possible interest to making purchasing decisions. This study aims to bridge the gap of knowledge between the customer journey and marketing automation concepts and to conceptualize a framework which describes the process of utilizing the customer journey concept in delivering marketing automation solutions. As a result, this study proposes a framework within which it is possible to start understanding and studying the gap between the customer journey and marketing automation and test how the customer journey is utilized in marketing automation in practice. Additionally, this paper provides managerial implications to those companies that are involved with marketing automation activities, and identifies the next steps needed in order to validate and finalize the framework.

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Keskittyminen asiakaskokemukseen on havaittu avaintekijäksi sekä kilpailuedun saavuttamiseksi että asiakkaiden hankinnaksi ja säilyttämiseksi. Asiakaspolku-käsite on noussut yhdeksi palvelumuotoilun merkittävimmistä metodologioista asiakaskokemuksen määrittelemisessä ja analysoinnissa. Useimmiten asiakaskokemuksia syntyy silloin, kun asiakkaat ovat vuorovaikutuksessa yrityksen markkinointimateriaalin kanssa. Markkinointiautomaatio, eli teknologiaa ja prosesseja hyödyntäen automatisoitu yksilöllisen ja oikea-aikaisen markkinointisisällön toimitus asiakkaille, on noussut merkittäväksi keinoksi hallita näitä vuorovaikutuksia sekä asiakkaiden ostopolkuja heidän siirtyessä mahdollisesta kiinnostuksesta ostopäätöksen tekoon. Tämän tutkimuksen tavoitteena on muodostaa ymmärrys asiakaspolku- ja markkinointiautomaatio -käsitteiden välille ja luoda viitekehys, jolla kuvataan sitä, miten asiakaspolku-käsitettä on mahdollista hyödyntää markkinointiautomaation ratkaisuissa. Tämän tutkimuksen lopputulemana on viitekehys, jonka avulla on mahdollista ymmärtää asiakaspolku-käsitteen ja markkinointiautomaation välisen yhteys ja aloittaa sen tarkempi tutkiminen sekä tutkia, miten asiakaspolku-käsitettä käytännössä hyödynnetään markkinointiautomaation ratkaisuissa. Lisäksi tämä tutkimus esittää käytännön ehdotuksia yrityksille jotka ovat tekemisissä markkinointiautomaation ratkaisujen kanssa, ja yksilöi seuraavat tarvittavat vaiheet viitekehyksen vahvistamiseksi ja viimeistelemiseksi.

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*"We did not come this far
only to come this far"*

I had always feared writing a thesis ever since I first heard of such a thing from my dad. How could I ever produce such a groundbreaking and scientific masterpiece? Looking back at this thesis project now, I still cannot believe how I've managed to pull it off. Alas, the time has come to search for new fears to overcome.

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1. INTRODUCTION

Some of the most radical evolutions in business during the past decade have arisen as a result of advances in information technology. Information technology has transformed the very foundations of commerce as customers have been empowered with new channels and methods for gathering information for making their purchasing decisions, while companies have adopted and expanded their business models to include the benefits from advances in information technology (Montgomery & Smith 2009).

Technology has also expanded the opportunities of practitioners in many fields, one of them being marketing (Heimbach et. al. 2015; Järvinen & Taiminen 2016). Marketers have gained access to a wide array of tools which they can utilize to more efficiently reach their target audiences with personalized marketing content at the right moment of their purchasing decision-making processes (Ginty et. al. 2012; Kantrowitz 2014; Wood 2015). These tools and the tactics they are used with is referred to as marketing automation.

With information technology changing the rules of the game for many businesses and markets, the quest for developing competitive advantage has accelerated. One of the identified means for achieving this edge is higher focus on the customer (Gentile et. al. 2007; Kotler et. al. 2009). Managing customer experience specifically has been identified as a significantly efficient approach for increasing competitive advantage. (Berry et. al. 2002; Verhoef et. al. 2009; Lemon & Verhoef 2016)

This master's thesis aims to understand how customer experience can be employed in marketing automation solutions by utilizing the customer journey approach to provide superior competitive advantage to companies and marketers. The first chapter of this thesis introduces the setting for the research, including the background for the research and current state of the studied phenomena in literature. The specific research objectives, scope and methodology for conducting the study are also covered.

1.1. Background of the research

This thesis is done in cooperation with Biit Oy. Biit Oy (henceforth referred to as Biit) is a Finnish Salesforce partner offering services, solutions and consultation related to the implementation and usage of Salesforce's cloud computing offerings and their derivatives. One area of these offerings is marketing automation and marketing automation software. Biit wishes to be able to provide its customers with marketing automation solutions that help them be as customer-centric as possible as they provide their customers superior customer experience. To do this, understanding how customer experience has an effect on the delivery of marketing automation solutions has been identified as a key area of interest. The customer journey concept has been identified as a highly potential method of choice for assessing how companies' services and customer experience is currently set and for providing the guidelines for delivering excellent solutions.

However, literature from academia nor practitioners covering both the customer journey and marketing automation is very limited. Biit therefore wishes to bridge the knowledge gap between the customer journey and marketing automation concepts by conducting a study on how the customer journey can be used to find the key points that ensure delivering the best marketing automation solution possible. Specifically, Biit is interested in identifying what implications customer journeys have on marketing automation solutions, as well as conceptualizing a framework that guides and facilitates the usage of the customer journey when defining marketing automation solutions, if possible.

1.2. Research objectives

Based on the aforementioned background of the study, the two main research objectives for this study are defined as follows:

- Define the customer journey and marketing automation concepts and bridge the gap of knowledge between them.

- Construct a framework which describes and facilitates the usage of the customer journey concept in delivering the appropriate marketing automation solution.

A number of research questions that guide this research are derived from the research objectives listed above. These are:

- What are the key components of both customer journey and marketing automation theories?
- How do these components relate to each other; what are their dependencies and outputs?
- Can these relations be generalized to form a framework or model that connects the customer journey to marketing automation?
- What is the process for utilizing the customer journey in marketing automation?

1.3. Literature review & research gap

A customer journey is made up of multiple 'touchpoints' or interactions which create a 'journey' (Stickdorn & Schneider 2011; Norton & Pine 2013; Lemon & Verhoef 2016). These touchpoints can occur at different phases of the journey across different channels (Zomerdijk & Voss 2010). A customer journey is associated to a 'persona', a fictional representation of a potential customer based on the grouping of observed patterns and other findings of user behavior (Moritz 2005). Usually when utilizing the customer journey as a tool for analysis, multiple personas and their journeys are visualized (Følstad & Kvale 2018; Stickdorn & Schneider 2011) and then analyzed (Lemon & Verhoef 2016). The main benefit of the customer journey approach is that it views service encounters from the user's point of view and successfully captures the factors that influence user experience (Zomerdijk & Voss 2010; Stickdorn & Schneider 2011). Other mapping tools and approaches exist, such as blueprinting which focuses on what and how companies produce their services (Bitner et. al. 2008; Lemon & Verhoef 2016). This research paper, however, will focus on the customer journey as the main service design paradigm due to its customer-centric focus.

Marketing automation is essentially the usage of information technology to plan and execute marketing activities in an online environment. It can be defined to consist of both technology and methods. (Järvinen & Taiminen 2016) A holistic theory of marketing automation does not exist; therefore, marketing automation cannot be defined solely by investigating one dimension of marketing theory. Instead, it is seen as covering multiple areas of marketing theory. In this paper marketing automation is investigated through the 'marketing and sales funnel' (D'Haen & Van den Poel 2013), 'lead nurturing' (Järvinen & Taiminen 2016) and 'lead scoring' (Ginty et. al. 2012), 'inbound marketing' (Halligan & Shah 2014; Opreana & Vinerean 2015) and 'relationship marketing' (Grönroos 1994; Gummesson 2017) theories. In addition, key features of marketing automation regardless of approach are 'personalization' (Kantrowitz 2014; Vesanen 2007) and the technology which enables marketing automation to work; this is referred to as 'marketing automation software' (Järvinen & Taiminen 2016).

A lot of related research sidelines customer journey from the customer experience point of view, as the customer journey is a tool, most commonly used by practitioners and not scholars, that is used to observe services from a user's perspective. Many of the previous scientific research that touch upon the customer journey concept investigate how the customer journey is linked to customer experience, not how it is linked to marketing activities or marketing technologies such as marketing automation. Lemon & Verhoef (2016) state in their paper that from the customer journey and customer experience perspective, the link between what they refer to as the purchase funnel and the customer journey is missing, most notably in the areas of short-term behavioral consequences and long-term loyalty effects.

Likewise, existing theory on marketing automation is sparse, mostly as it is a new and rapidly evolving field of study but also because it is, in essence, a mix of many areas of traditional marketing which have been amplified and modified through the recent introduction of modern information technology tools and software. A number of scientific studies related to marketing automation only consider marketing automation as an indirect part of the research (e.g. Jena & Panda 2017; Järvinen & Karjaluoto 2015; Rouziès et. al. 2005) or focus on practical aspects of marketing automation software, such as best practices and how to implement it (e.g. Wood 2015; Halligan & Shah 2014). The lack of theory and

research has recently been noted for example by Järvinen & Taiminen (2016), who identify multiple areas in need of further studies in their research paper.

Studies that discuss specifically both marketing automation and customer journeys, or even investigate the effects of marketing automation on customer experience or other related facets of the customer journey framework are specifically scarce. This paper aims therefore to bridge the lack of understanding and linkage between these two concepts and provides new insights into how the two concepts and theories possibly relate to each other.

1.4. Research methodology

The purpose of this research paper is to identify the linkage between the customer journey and marketing automation theory concepts and to bridge this gap in knowledge through a framework. For this purpose, the main research methodology utilized in this paper is the constructive research approach.

The constructive research method is a methodology which aims to create a construct – such as a framework – from the combination of theoretical insights and empirical findings in order to solve problems. Kasanen et. al. (1993), who were highly influential in introducing the constructive research method, specifically define the practice of using the method as "managerial problem solving through the construction of models, diagrams, plans and organizations". (Kasanen et. al. 1993; Oyegoke 2011)

One of the main reasons for the benefits of using a constructive research approach is how it provides a close connection and interaction between theoretical studies and practice. It is identified to be especially suitable for bridging the understanding between multiple theories and/or practices (Oyegoke 2011), which is exactly the situation with this study. Furthermore, constructive research provides results of both theoretical and practical relevance. (Kasanen et. al. 1993; Oyegoke 2011)

Carrying our constructive research has many forms and methods. Kasanen et. al. (1993) propose the following generic phases for conducting constructive research:

1. Find a practically relevant problem which also has research potential.
2. Obtain a general and comprehensive understanding of the topic.
3. Innovate, i.e., construct a solution idea.
4. Demonstrate that the solution works.
5. Show the theoretical connections and the research contribution of the solution concept.
6. Examine the scope of applicability of the solution.

Oyegoke (2011) adds to these phases by emphasizing the importance of supporting the solution to the identified practical problem through literature. This namely refers to phase 2 of the research phases as presented by Kasanen et. al. The order of these steps may vary from case to case, and that the simplicity, relevance and ease of use of the framework should be the driving factors to ensure the practical utilization of the construct. (Kasanen et. al. 1993) Lehtiranta et. al. (2015) note that due to the heuristic and creative nature of constructive research very few processes or aids for constructing a framework exist.

Due to the scope of this research paper, market testing and validation is not included in this study. This mainly refers to the 4th phase of the research phases presented by Kasanen et. al. Thorough market validation will be carried out in the case company after the completion of this research. Importantly, Kasanen et. al. (1993) note that a construction can provide theoretical and managerial contributions even if the construct cannot be tested in practice.

As the framework developed in this paper is not tested and validated, a substitutive research approach is to be used to understand and develop the framework. For this paper the abductive research approach, or abductive reasoning, is utilized in constructing the framework and providing argumentation. Abductive reasoning is a form of logical reasoning which, in its simplest form, aims to find the most likely explanation for a phenomenon. In practice, this means that the framework and its linkages presented in this paper are argued and presented from the most likely and logical perspective and backed up by scientific proof. (Kovács & Spens 2005). Dubois & Gadde (2002) note that an abductive

approach is specifically advantageous if the aim of the research is to discover new things through variables and relationships.

This study will mostly utilize literature to understand both the customer journey and marketing automation concepts as well as their relations. The literature for the study consists of both material from academics as well as practitioners. The literature consists of books, journal articles, blog posts, guidebooks, web articles, and previous dissertations, and are gathered from multiple sources including academic and public libraries, online academic databases and search engine results such as Google and Google Scholar.

This research paper will follow the proposed phases for conducting constructive research as proposed by Kasanen et. al. (1993) as the structure for this thesis. The identification of a relevant research problem is covered in Chapters 1.1 and 1.2; obtaining a comprehensive understanding of the topic is performed in Chapters 2 and 3 where the customer journey and marketing automation concepts are studied; the constructed framework is presented in Chapter 4 with its theoretical connections, research contribution and scope of applicability discussed in Chapter 5; conclusions are presented in Chapter 6.

1.5. Delimitations of the study

A notable delimitation of this study stems from literature itself: many of the theoretical concepts examined in this paper are not thoroughly researched by scholars and in some cases not well covered by practitioners either (e.g. Lemon & Verhoef 2016; Järvinen & Taiminen 2016; Holliman & Rowley 2014). This means that the framework and outcomes of this paper are reliant on what has been researched and identified by authors; more in-depth knowledge into the topics covered in this paper may result in more accurate and definitive results. Furthermore, a number of other theoretical concepts could be argued to be related to either the customer journey mapping or marketing automation concepts which are not examined in this paper. These could potentially have an influence or provide further input for both the constructed framework as well as general understanding of this paper's research topic.

Another delimitation formulates from the business-to-business and business-to-consumer market differences. In traditional marketing theory, business-to-business and business-to-consumer settings have many differences (Kotler et. al. 2009). However, in marketing automation these differing aspects in theory are likely to be less prominent. In their research paper which focuses on the B2B context, Järvinen & Taiminen (2016) claim that especially the content personalization and behavioral targeting functions of marketing automation and digital marketing should presumably apply also within B2C. Most studies on marketing automation also focus specifically on business-to-business environments. From the customer journey perspective, the two domains of business-to-business and business-to-consumer are not identified by researchers to have many conflicts. The main differences are most commonly related to the decision-making process, which is often more complex in business-to-business environments (Kotler et. al. 2009). However, investigating decision-making processes are not included in his research.

This paper will mainly focus on marketing automation studies within the B2B context but will not be limited to only this domain due to scarcity of available research. Instead, whenever a business-to-consumer approach is used, it is noted separately to ensure the two domains are kept separate while still providing the opportunity to investigate marketing automation within both domains. This should not affect the outcomes of this paper; however, a possibility remains.

Another delimitation of the study arises from the scope of this paper: the market testing and validation of the proposed framework is not included in this study's scope but is rather set to happen after the completion of the thesis. As such, the framework that is constructed is mostly reliant on findings and proposals from previous studies and literature on the covered subjects. This subjects the framework to certain inaccuracies, but it should be noted that the framework is to be tested and validated after the completion of this paper, thus resulting in empirical data to shape and/or validate the framework.

Finally, the research methodologies used in this paper – the constructive research method and abductive research approach – carry some limitations in themselves. To an extent, constructive research and abductive reasoning both put the author's perception of the topics on display and may result in different outcomes and conceptions than if another researcher

studied the same phenomenon. Furthermore, this paper addresses the proposed research questions specifically from the point of view of these two methodological approaches; other methodologies and approaches, such as utilizing topics from the field of behavioral science, are not covered in this paper, though they may provide further insights into how the customer journey concept can be utilized in forming, developing and delivering marketing automation solutions.

2. CUSTOMER JOURNEY

One of the most prominent trends recently in doing business has been the desire to provide excellent customer experience (Berry et. al. 2002; Verhoef et. al. 2009). Delivering superior customer experience in comparison to competitors is seen as a significant competitive advantage for companies in both acquiring new and keeping current customers (Lemon & Verhoef 2016). Companies have awoken to this by attempting to align their operations and service encounters with customers to be as customer-focused and positive as possible (Berry et. al. 2002). This has, in turn, resulted in an increased interest in various system design approaches that assist customers in defining what the best possible principles for achieving this are.

Before customer journey tools and frameworks became popular, a widely-used service design methodology for assessing service interactions between a company and a customer was service blueprinting. The service blueprinting method was conceived by Shostack in 1984. In service blueprinting a customer's sequence of service interactions is illustrated with each touchpoint being linked to the company's underlying service process. (Shostack 1984) A common downfall of service blueprinting is its lack of inherit customer focus. This can result in service blueprinting and other similar internal process-oriented methodologies not being effective, with growing concerns that the continuous developments in digital technologies may directly and indirectly render service blueprinting as obsolete when conducting customer-oriented service design analysis. (Bitner et. al. 2008; Lemon & Verhoef 2016) The lack of customer focus and insights also means that it only captures observable actions and not, for example, feelings and customer behavior.

Other methodologies for analyzing services, specifically the path a customer takes when interacting with a company during their purchase process, do exist. However, the customer journey has the main benefits of being customer-oriented, as described above, as well as viewing customers as individuals with their unique behavioral traits and needs, and not as a mass of people. (Wolny & Charoensuksai 2014) The latter is especially significant as marketing automation, covered in Chapter 3, aims to deliver a personalized marketing

experience to each customer through automation. It can therefore be concluded that utilizing the customer journey concept should provide the most thorough framework and unique point of view into assessing customers' actions in conjunction with marketing automation.

2.1. What is the customer journey?

The customer journey and customer experience management in general have been receiving increased consideration lately. For example, the Marketing Science Institute (2016) ranks customer experience as one of the most important research areas in the upcoming years. Lemon & Verhoef (2016) assess this to likely be due to the understanding that positive customer experience is a driving factor in achieving higher conversion rates and customer loyalty, both of which in turn result in increases in sales revenue. High customer experience has been linked to increases in both new sales and retention sales also in the past (e.g. Fornell & Wernerfelt 1987; Gustafsson et. al. 2005). As the customer journey has an exceptionally notable focus on customer experience, it has attracted attention as a means for companies specially to improve their services and to achieve higher customer experience, which has been observed e.g. by Zomerdijk & Voss (2010).

Stickdorn & Schneider (2011) define a customer journey as "an engaging story based upon their experience" that visualizes the service user's experience. They add that a customer journey is made up of touchpoints which users interact with. Norton & Pine (2013) similarly define a customer journey as a sequence of events that customers go through when learning about, purchasing or otherwise interacting with a company. The sequence of these events may or may not be designed (Norton & Pine 2013). Lemon & Verhoef (2016) further agree, and state that the aim of the customer journey is to understand the possible paths a customer may take to satisfy their needs. Berry et. al. (2002) propose that the customer journey is a journey which starts from assumptions the customer might have about a company before a transaction phase and ends when the customer believes the experience has ended. On the other hand, Clark (2013) offers a slightly differing take on the concept of a customer journey by asserting that it is a "description of customer experience where different touchpoints characterize customers". A customer journey can

therefore generally be stated to be a depiction of a customer's interaction with a company, consisting of a given number of sequential touchpoints which describe the service from the user's perspective.

As far as terminology is concerned, in their case study from 2010 Zomerdijk & Voss discovered that companies referred to a series of touchpoints specifically as a customer journey. The customer journey concept and similar derivatives are sometimes also referred to as e.g. 'purchase journey' (Verhoef et. al. 2009), 'customer staircase or customer ladder' (Christopher, et. al. 2002) or 'customer corridor' (Meyer & Schwager, 2007) by academics, but given the rather widespread usage of the term 'customer journey' nowadays elsewhere in academia and in business, the term customer journey will be used throughout this research. This view is further backed up by a recent study into the terminology & definition of the customer journey framework by Følstad & Kvale (2018).

The distinctive feature of a customer journey is that it places the customer at the core of the analysis (Zomerdijk & Voss 2010). Patrício et. al. (2011) further support this view with their conclusion that a customer journey refers to the touchpoints related to the service specifically from the perspective of the customer. In other similar service design methodologies, such as service blueprinting (Shostack 1984), the focus is on the company's internal strategy for providing services. This makes the customer journey an interesting concept for organizations that look to provide their offerings with superior customer experience. Zomerdijk & Voss (2010) highlights that the customer journey captures the user's point of view and experiences, and involves all activities related to providing a service specifically from the customer's perspective. Stickdorn & Schneider (2011) also find that a customer journey successfully captures the factors that influence user experience. Lemon & Verhoef (2016) add that these identified factors and activities can then be assessed and developed further to improve customer experience.

Many academics define the customer journey specifically as the transition of becoming a customer through a number of stages in the journey. For example, Nenonen et. al. (2008) classify a customer journey as the customer's transition from never-a-customer to always-a-customer. Stickdorn & Schneider (2018) and Rosenbaum et. al. (2017) also divide their customer journey map into three sequential parts: pre-service, service and post-service.

Pre-service and post-service are defined here as any customer experience taking place indirectly and either prior to, or after, the service, while service itself refers to the service engagements the customer has with the service and its provider (Stickdorn & Schneider 2018). As this paper is viewing how the customer journey can be used in marketing automation activities, the most relevant segment of this and similar timelines is the actual service period.

Sauro (2015) works with the assumption that customer journeys are often a sequence of events that happen in a linear timeline. He claims that the timeline can then be broken into stages, or even small steps, where the stages are likely to be similar to what companies use as their sales funnel stages. Sauro states that these stages could therefore be, for example, Awareness (decision to start buying process is made), Consolidation (researching for information), Preference (narrowing down offerings based on research & recommendations), Action (purchase decision is made and executed, offering is delivered) & Loyalty (usage/consumption of purchased offering, recommendations/criticism to other consumers), which are the sales funnel stages he uses in his book. (Sauro 2015)

Nenonen et. al. (2008) also divide customer journeys into phases. Based on their insights from different authors, they identify eight from a customer experience perspective and five from an internal process perspective. These are shown in more detail in Table 1.

Table 1. Customer Journey phases from customer experience and internal process perspectives (modified from Nenonen et. al. 2008).

Phases from customer experience perspective	Phases from internal process perspective
Need: I'm considering a purchase. Who should I approach?	
Enquire: I make general enquiries to possible suppliers.	Orientation
Approach: I decide to make more specific enquiries to a selected few.	Approach
Recommendation: They make recommendations and/or send proposals.	Action
Purchase: I decide to purchase and place my order with one supplier.	Depart
Experience: They supply, and I use the product or service.	Evaluation
Problem: I have a problem that is reported to and handled by the supplier.	
Reconsider: I'm considering purchasing something else. Should I go back?	

Sales funnel stages are discussed more thoroughly in Chapter 3.2, including the sales funnel framework which will be used within the scope of this study.

The customer journey does also have its challenges and limitations. Customer journeys have become increasingly complex due to the exponential increase in the number of channels a customer may interact with a company. With the emergence of an immense number of new online marketing channels, companies have less control over the customers' paths and customer experience (e.g. Stickdorn & Schneider 2011; Lemon & Verhoef 2016). It also becomes increasingly difficult to attribute the success to the right channels and touchpoints, as switching between channels is very frequent. This is why customer journey analysis has become increasingly interesting, for example from the multichannel management point of view, as noted by Lemon & Verhoef (2016). Wolny & Charoensuksai

(2014) also conclude in their research that understanding customer journeys has become a necessity to managing customer experience in the current multi-channel environment.

2.2. Touchpoints

A key component of customer journeys are touchpoints. The term touchpoint (often 'touch point') has become more or less the standardized term when referring to interactions between a company and a customer within a customer journey approach. Zomerdijk & Voss (2010) define touchpoints as instances which occur when a customer "touches" or interacts with an organization. These touchpoints can happen across multiple online channels and at various points in time. (Zomerdijk & Voss 2010) Kotler et. al. (2009) similarly describe touchpoints as occasions where a customer is confronted by a brand and a product. Meyer & Schwager (2007) add to these definitions by claiming that touchpoints are specifically the direct contact between a customer and a company's offering or a representation of it. As identified by Stickdorn & Schneider (2011), touchpoints are most often human-to-human or human-to-machine.

The research of critical service encounters between a company and its customers and their effect on customer satisfaction can be traced to the early phases of service literature (Lemon & Verhoef 2016). These service encounters were not yet called touchpoints as the term did not exist, however their definitions and uses are nearly identical. Modern variations in terminology for touchpoints exist especially in literature before and around the turn of the millennia (see e.g. 'clues' by Carbone & Haeckel 1994 & 'cues' by Zomerdijk & Voss in 2010) when the theoretical concept of the modern customer journey was not existent. These terms are used to describe more or less what a touchpoint is identified in the previous paragraph: interactions, activities or events between a customer and an organization that are involved in shaping customer experience. It is noteworthy that in the more recent research paper by Zomerdijk & Voss in 2010 they refer to touchpoints as cues, even though the customer journey as a concept had already become widespread in use. In their research Zomerdijk & Voss discovered, however, that case companies almost unanimously referred to these encounters as touchpoints instead. For clarity and the purpose of this research, the

term touchpoint is used to refer to specific points of interaction between a company and a customer within the customer journey unless otherwise stated.

A notable peculiarity of touchpoints is that they do not only happen between a company and their customers but can also happen between a customer and a third-party organization. This is observed in literature by e.g. Meyer & Schwager (2007) and Stickdorn & Schneider (2011). An example of such a touchpoint can for example be a review or rating of the company's service on a third-party web site that ranks different service providers. This aspect makes managing what happens at touchpoints and which touchpoints a customer interacts with more challenging and complex for companies. To add to the complexity of touchpoints, Verhoef et. al. (2009) perceptively state that experiences from earlier touchpoints may affect the experiences in following touchpoints. These experiences may not happen between a customer and a company, meaning that customers may enter their journeys or buying processes from slightly different settings without the company's control.

Touchpoints have differentiating factors that makes separating or grouping them possible. In their aforementioned research paper from 1994, before the conceptualization of the modern customer journey concept and the term 'touchpoint', Carbone & Haeckel (1994) refer to these instances as clues and argue that orchestrating these clues that are generated by products, services and the environment is a key component of designing experience-centric services. Carbone and Haeckel further separate clues into mechanic clues, which are emitted from things such as a furniture store's interior design, and humanics clues, which originate from people – during a face-to-face interaction with a furniture store clerk, for example. (Carbone & Haeckel 1994) Albeit not present at the time of the research of Carbone & Haeckel and therefore not addressed, one could argue that a modern additive to these two types of touchpoint-like clues could be electronic cues, which originate from an online source, such as a website.

Lemon & Verhoef (2016) identify four different categories of touchpoints related to customer experience. These are brand-owned, partner-owned, customer-owned, and social/external/independent touchpoints. De Haan, et. al. (2016) on the other hand divide touchpoints into two categories: firm-initiated and customer-initiated touchpoints. Lemon

and Verhoef (2016) place their brand-owned and partner-owned touchpoints into the firm-initiated touchpoint category, and the customer-owned, and social/external/independent touchpoints into the customer-initiated touchpoint category.

From the perspective of this research paper the most interesting of these groups of touchpoints are the brand-owned touchpoints and firm-initiated touchpoints. These are the points of interaction between a company and its customers that can be proactively managed by the company and their marketing automation-related actions. Lemon & Verhoef (2016) argue that these touchpoints are interactions that are both designed and managed by the company and within their control. They name all brand-owned media, such as online advertising and websites, as included in this group.

As already mentioned in Chapter 2.1, touchpoints can occur across many different channels and at multiple points in time (Zomerdijk & Voss 2010). Some touchpoints are also more efficient than others due to which stage of the customer journey they are most often interacted with: a customer landing on a web page through Google search is less likely to buy than a customer that navigates to the same page by directly loading the page. The effect of touchpoints can also be dependent on previous touchpoint interactions. (Lemon & Verhoef 2016) This complexity makes managing customer journeys and customer experience increasingly difficult for companies. Lemon and Verhoef (2016) note that the exponential increase in possible customer touchpoints and reduced control of the experience has required companies to integrate multiple business functions together, such as information technology, marketing and service operations.

While technology has advanced the number of available channels of interaction and their ease of access to customers, several tools have also been developed with the aim of controlling these touchpoints and their emitted customer experience. The online tools used in marketing that perform these operations are referred to as marketing automation tools or marketing automation software, and the process of controlling and inducing these interactions in an online environment is called marketing automation. Marketing automation will be covered in detail in Chapter 3.

2.3. Personas

A key component of understanding customer activities through the customer journey is the 'persona'. Alan Cooper is most often credited as the inventor of personas (e.g. Blomkvist 2006; Pruitt & Adlin 2006) in his book 'The Inmates are Running the Asylum' from 1999 and articles from the leading years before this (Blomkvist 2006). In Cooper's representation, personas combine likely personal characteristics and attributes of users and present them in the format of a potential hypothesized person (Gagliano 2006).

The definition of a persona has slightly evolved since its inception by Cooper. Stickdorn & Schneider (2011) present that personas are created to represent a group of users that share selected common traits, such as areas of interests. Grudin & Pruitt (2002) specifically note that personas are "given life stories, goals and tasks", and add that these attributes can include demographic attributes, such as age, gender, education and socioeconomic status, and other attributes, including occupations, families, friends and other differentiating factors. These attributes highlight the human perspective of personas. To further emphasize the human aspect of personas, they are given fictional names, personal details and even a photo. (Grudin & Pruitt 2002) Likewise, according to Moritz (2005) a persona is a fictional presentation of a person that "represents and merges patterns that have been identified from the research insights". Goodwin (2009) states that the key to creating useful personas is to identify these behavioral patterns from the company's gathered data on customers and to clearly convey them in the form of a character. The most effective and widely-used method for gathering data is stated by Goodwin (2009) to be interviews. An example of a persona template is presented below in Figure 1.

Figure 1. An example of a persona template (Business Design Tools 2018).

Cooper originally conceptualized the persona to be used to be as a guide for development teams in marketing and user-centered design. Goodwin (2009) states that personas are an effective tool for designing nearly anything that is used or experienced by a customer. These include, for example, web sites, services, events and advertising campaigns. Goodwin also states that the most prolific use case for personas is in supporting design and communication, but they are also commonly and efficiently used in conjunction with marketing activities. (Goodwin 2009) In user-centered design approaches, such as the customer journey, these personas are most often attributed to one journey and a customer journey analysis most often includes multiple personas that represent the different customer segments of the product or brand (Stickdorn & Schneider 2011).

It is important to note that personas are not another form of market segmentation. Brechin (2008) states that personas and market segmentation provide different kinds of information, with market segmentation characterized by yielding companies with quantitative information whereas personas contribute qualitative insights into a user's behavior. This notation is also highlighted by Goodwin (2009), who claims that personas and marketing

segmentation do often provide similar outputs but have some key differences. The similarities and differences between market segments and personas is shown in Figure 2 below.
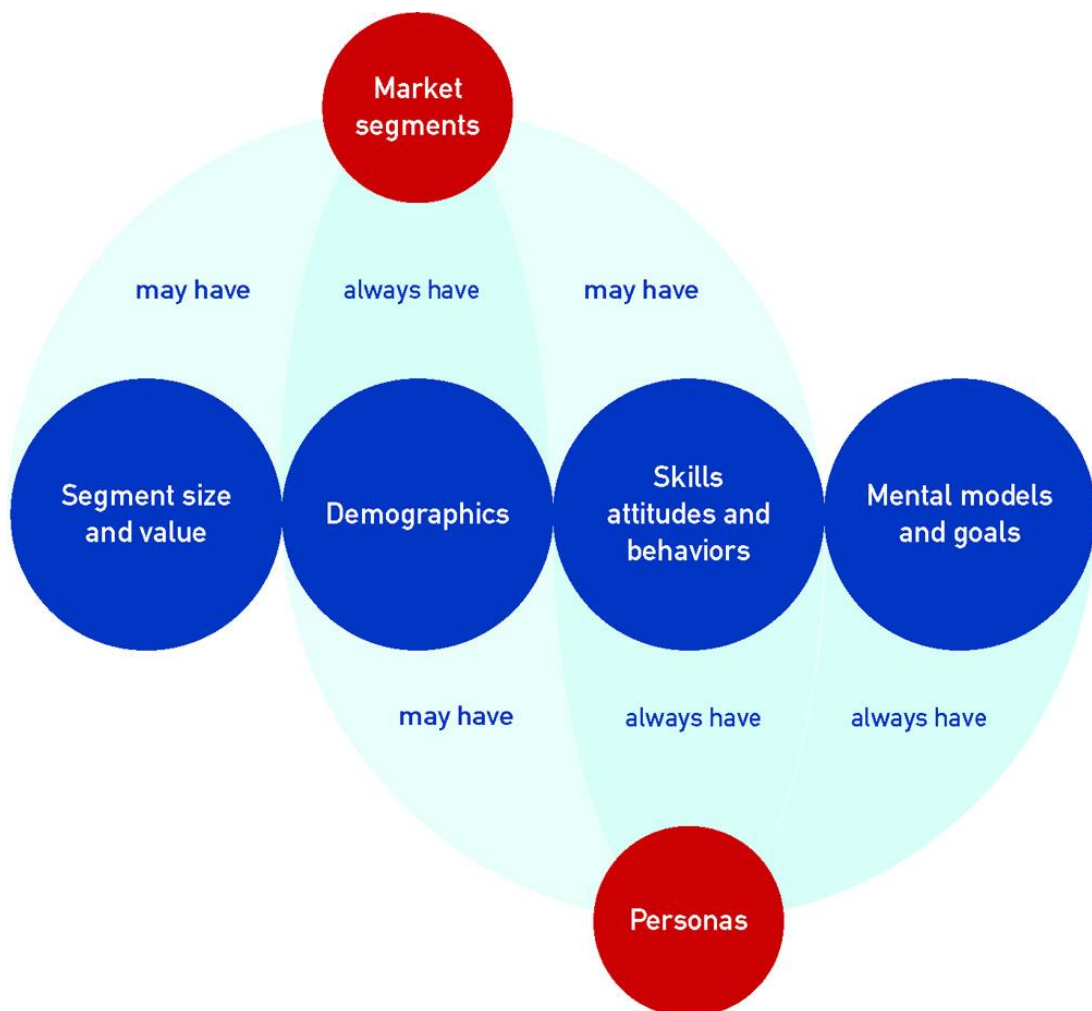
Figure 2. The differences of personas and market segmentation (Goodwin 2009)

2.4. Customer journey mapping and analysis

The practice of assessing and depicting customer journeys and their constituent parts is often referred to as customer journey mapping. Customer journey mapping aims to "map" the customer journey in a visual representation in order for analysis or other activities to take place. Rosenbaum et. al. (2017) define customer journey mapping simply as the visual depiction and documentation of a customer journey. Based on their research into customer

journey terminology and definitions in academia, Følstad & Kvale (2018) present customer journey mapping as "the activities to analyze an existing service process as-is". Customer journey analysis, on the other hand, is used to refer to the actual practice of studying and investigating the customer journey, often after the mapping has been done. (Lemon & Verhoef 2016)

In a broader sense, customer journey mapping makes it possible to better understand the expectations of customers as well as predict and influence customer behavior. Stickdorn & Schneider (2011) present that the overview of a customer journey map makes it possible to identify problematic segments as well as areas of innovation, whereas focusing specifically on touchpoints enables more rigorous analysis of individual stages or parts of the journey. Lemon & Verhoef (2016) agree and suggest that when analyzing customer journey maps, the focus should be on understanding how personas interact with a series of touchpoints as they move through the different stages of their journey, what options they have when engaging at touchpoints and what the repercussions of their choices are.

Multiple tools and frameworks for mapping customer journeys exists, most notable of which are the customer journey map, also referred to as the customer experience map (e.g. Rosenbaum et. al. 2017), and customer journey canvas (e.g. Van der Pijl et. al. 2016). These two tools are very similar in nature as they share most, if not all, traits and components. Ultimately, both tools are suitable for mapping customer journeys. (Lemon & Verhoef 2016; Stickdorn & Schneider 2011)

The prerequisites for creating a customer journey map are defining the touchpoints that make up a customer journey as well as the personas that are associated with these journeys. Stickdorn & Schneider (2011) state that once touchpoints have been identified, they can be connected into a visual representation in the form of a customer journey map and attributed to their respective personas to make them more human-like and engaging. Rosenbaum et. al. (2017) similarly assert that a customer journey map should "list all possible organizational touchpoints a customer may encounter during the service exchange process". The touchpoints are typically depicted horizontally on a customer journey map in relation to which part of the process timeline they are encountered (Rosenbaum et. al. 2017), and they are often depicted through user insights (Stickdorn & Schneider 2011).

Sauro (2015) presents that the process of mapping a customer journey starts from selecting the persona(s) for which the customer journey is to be mapped. The personas should not be made up but should instead represent and merge patterns that have been identified from the prior gathered insights and possess life goals and tasks they wish to accomplish. The number of personas should not be excessive. After this, the stages and smaller descriptive steps of the customer journey are discussed, defined and presented visually, often in the form of a timeline. As discussed before in Chapter 2.1, the used customer journey stages are often the same as in the company's sales funnel stages. Cordewener (2016) adds to this by suggesting that the drivers for each stage should also be identified during customer journey mapping. Finally, the customer journey is completed using a sequence of events, i.e. touchpoints, within the defined stages and steps. This process sequence of distributing the touchpoints over a pre-defined set of phases is also enunciated by Cordewener (2016). In addition to adding touchpoints to the customer journey map, it is important to identify the needs, activities, obstacles and other aspects of a customer journey that a persona is faced with during their journey in each stage and touchpoint.

After the customer journey mapping is complete they can be analyzed with the aim of identifying conclusions and actions that should be undertaken. When analyzing customer journey maps, it is important to pay attention to how the personas interact with specific touchpoints. Touchpoints may have direct and indirect effects on the purchase and the customer journey. If possible, it is crucial to also try to identify so-called "moments of truth", which are the most critical touchpoints within the customer journey. Identifying the key trigger points associated with these touchpoints can help understand and address why personas continue or discontinue their journeys. (Lemon & Verhoef 2016)

Some limitations and criticism for the customer journey approach also exist. Cordewener (2016) identifies that customer journeys have some limitations when analyzing and comparing customer journeys as they are tied into having a fixed amount of stages, even though customer journeys may have differing lengths. Likewise, the customer journey does not inherently take repetition into consideration, but treats each persona as having one customer journey throughout its timeline (Cordewener 2016). It is important to be aware of these limitations when conducting analysis using the customer journey.

As part of customer journey analysis, Lemon & Verhoef (2016) discuss the effect of customers switching channels during their customer journey. A customer may search for information about an offering on the web and sporadically switch from the company providing the information and nurturing the customer to another vendor from whom they may immediately purchase the offering. This is referred to as "research shopping". This can also happen when mixing online and non-online platforms and channels for searching for information, referred to as "showrooming" and "webrooming". (Lemon & Verhoef 2016) These actions are more commonly encountered with customer journeys where the purchasing decision is made in a short period of time, a typical characteristic of business-to-consumer interactions (Kotler et. al. 2009).

This aforementioned area of research is more broadly referred to as omni-channel theory, which is a part of multichannel literature. Multichannel studies of customer journeys can offer insights into channel choice behavior of customers as well as how to more thoroughly analyze and influence customer journeys. They also highlight how and why some channels are more useful with certain customers and during certain stages of the customer journey. The multichannel angle will not be explored in detail as a part of this paper, however it is beneficial to be aware of this trait in customer journey analysis and customer behavior.

3. MARKETING AUTOMATION

Advances in information technology have enabled marketing practitioners to automate and increase the efficiency of their marketing activities (Heimbach et. al. 2015; Järvinen & Taiminen 2016). Through automatized processes driven by technology they are now able to more accurately approach and engage with potential customers with the right content at the right time and track their purchasing process, providing superior customer experience while supporting sales and other business units with better quality and insights (Ginty et. al. 2012; Kantrowitz 2014; Wood 2015). This is called marketing automation.

Marketing automation is essentially the usage of information technology to plan and execute marketing activities in an online environment. Therefore, marketing automation cannot be defined solely by investigating one dimension of marketing theory. As a holistic theory of marketing automation does not exist, this paper will investigate marketing automation through various disciplines of marketing theory in order to understand its principles, and therefore enabling the incorporation of insights from the customer journey concept later in the paper.

As a first step the concept of marketing automation and its constituent parts are defined to understand the phenomenon that is being studied. To fully understand the full spectrum of marketing automation it is often studied within a pre-defined framework. In this paper, the marketing automation processes is investigated through the marketing and sales funnel model as it describes the nature, steps and processes of marketing automation and has successfully been used by academics before such as Järvinen & Taiminen (2016). A closer look at the process of how marketing automation tracks and guides customers through their purchasing process is examined through lead nurturing and lead scoring. Finally, the concept of inbound marketing and relationship marketing is explored to understand what makes it possible for marketing automation to efficiently be able to engage with customers in an online environment as they are nurtured through the marketing and sales funnel.

3.1. What is marketing automation?

Marketing automation is used to describe the automation of online marketing processes by utilizing technological solutions. According to Heimbach et.al. (2015) the term "marketing automation" was first introduced by John D.C. Little in 2001, as he described it as automated marketing decision support on the internet, conducted by analyzing the digital footprints of customers and drawing managerial implications for the entire purchase funnel from it. Marketing automation has in the past also been referred to as e.g. lead management automation (LMA) by Forrester Research, demand creation by Sirius Decisions and demand generation solutions by some of the earliest vendors of the software (Cummings & Blitzer 2010). Cummings & Blitzer (2010) do however find that today marketing automation has emerged as the most prominent term used by both vendors and companies alike.

In a more modern context, Heimbach et. al. (2015) describe marketing automation as "automatic customization or personalization of marketing mix activities". Järvinen & Taiminen (2016) likewise describe marketing automation as "automatically personalizing relevant and useful content" to meet and satisfy the needs of both current and prospective customers. Ginty et. al. (2012) define marketing automation more from a lead management point of view as a combination of methodology and technology that is used to "understand buyer intent, engage leads with personalized messaging and content, trigger the release of messages based on buyer behavior, and pass on the hottest leads to the sales team". Marketing automation is defined as consisting of both technology and processes also by Järvinen & Taiminen (2016).

The major enabler for marketing automation's inception and success has been the evolution of modern information technology. It has both empowered consumers with new ways of buying through a myriad of new online channels – and thus affecting how marketing and sales operate – as well as provided companies with automated tools to deliver timely content and a personalized experience to a wide array of customers. (Heimbach et. al. 2015; Montgomery & Smith 2009) Järvinen & Taiminen (2016) likewise accredit the rise of marketing automation-driven digital marketing to the recent advancements in information and communications technology, through which a number of new marketing channels have

emerged. They find that these new channels are quickly gaining substantial influence in customers' purchase decision making, especially within the B2B sector. Järvinen & Taiminen (2016) further state that marketing automation involves a software platform that can be used to deliver content based on specific rules set by users. It is this platform that enables marketing automation to exist.

Marketing automation has many recorded benefits from multiple studies on case companies. Many of these recorded benefits are focused directly on improvements in the companies' operations, but positive results also in areas such as customer satisfaction and customer experience are recorded. For example, Karjaluoto et. al. (2015) present generating sales leads, increasing operational efficiency in communicating with customers, advancing customer relationship management and building the company's brand as the main drivers for the adoption of digital marketing tools and technologies at companies, such as marketing automation. Heimbach et. al. (2015) add that successful implementation of marketing automation practices also results in increased customer satisfaction, higher return on marketing investments and improved decision-making among other benefits. Järvinen & Taiminen (2016) also claim that marketing automation increases the transparency of touchpoints in the online environment throughout a customer's purchasing process. Finally, Buttle (2009) states that marketing automation can result in increased customer experience.

In their recent single-case study from 2016 Järvinen & Taiminen study in-depth the benefits their case company realized after implementing marketing automation practices and software. They find that personalizing content to individual customer needs was only possible with the usage of IT tools, i.e. marketing automation software. Obtaining marketing automation software has helped the company in automatically handling incoming leads which are at different phases of their purchasing processes, as well as providing the company with actionable data from the activities of customers, such as page visits and content downloads. This has made it possible for the case company to better deliver the right marketing content and to get in touch with the customers at the right time. As a result of taking up marketing automation, the case company has realized a substantial increase in the volume and quality of generated sales leads. Marketing automation software

was seen as a vital requirement to accomplish these benefits at the case company. (Järvinen & Taiminen 2016)

It is important to note, however, that marketing automation and the software used to execute marketing automation activities is not enough to solve companies' marketing woes by itself. Marketing automation relies on having the right mix of marketing content available to provide a personalized experience with the right and relevant content to the customer, for example. Marketing automation also does not replace salespeople or human interaction but is rather an efficient tool that helps both marketeers and salespeople in their work while providing superior customer experience to customers. (Järvinen & Taiminen 2016)

3.1.1. Marketing automation software

The backbone of marketing automation is the technology which is used to automate marketing processes and activities at such efficient levels to provide significant operational advantages. The marketing automation software's activities and processes are automated, but they do rely on human input for defining the correct actions at correct times based on correct criteria. (Järvinen & Taiminen 2016) It is therefore important that the marketing automation software, along with the entire marketing automation solution in general, is set up correctly to attain the maximum benefits and deliver a superior customer experience.

It is important to note that marketing automation software includes a multiple array of functionalities and should not be confused with similar one-dimensional online marketing practices such as email marketing or database marketing. While marketing automation shares many principles with these practices, it is notably different by nature as it aims to comprehend and manage all marketing activities that are being utilized. Email marketing, for example, can therefore be seen as a part of marketing automation, covering one aspect and functionality of marketing automation software. (Heimbach et. al. 2015)

Buttle (2009) lists a total of 24 different functionalities offered by most large-scale marketing automation software. Mattila (2016) further categorizes these functionalities

into three separate groups: marketing functions, internal processes and analytics, with each category serving a distinctive purpose. The original 24 functionalities by Buttle (2009) are shown below in Figure 3.

Figure 3. Marketing automation software features (Buttle 2009)

From the perspective of this paper, the most relevant group of the marketing automation software functionalities listed by Buttle and categorized by Mattila is marketing functions. These marketing functions include configurable features such as triggers, workflows, rules, automated processes, targeting, campaigns and flows (Buttle 2009). Functionalities in the marketing functions category are therefore largely features which need to be customized to meet the specific needs and demands of the company and their market, thus tying to this paper's objective of understanding which aspects of marketing automation the customer journey affects. Functionalities included in the marketing functions category by Mattila are campaign management, customer segmentation, direct mail campaign management, email campaign management, event-based marketing, internet marketing, keyword marketing, lead generation, loyalty management, market segmentation, search engine optimization, telemarketing and trigger marketing (Mattila 2016).

Marketing automation software uses similar principals as Web analytics to track customers' online activities, most commonly through browser cookies and IP addresses (Buttle 2009; Järvinen & Taiminen 2016). The most interesting web analytics insights from a marketing automation and customer journey perspective are page views and navigation paths. While web analytics tools & software mostly focus on the overall statistics of web page usage (e.g. Järvinen & Karjaluoto 2015), marketing automation is focused on identifying and tracking individual customers and their actions and online behavior (Järvinen & Taiminen 2016). These insights and data can then be used for example to optimize marketing automation activities directly within the marketing automation software (Buttle 2009), or utilized elsewhere, such as within a customer journey approach or defining new digital content marketing topics, to improve marketing impact and results.

Marketing automation has the added benefit of going further than web analytics both in what personalized content or other actions are performed to meet the customers' needs as well as in the insights it is able to gather. When a customer interacts with a marketing channel through a touchpoint, the underlying marketing automation software is informed about this action and its details. The marketing automation software then generates an optimal response to the customer based on data about the interaction, rules and triggers as well as existing data of either the specific customer or similar customers. Marketing automation software also enables the placement of tags on web pages and forms for capturing customers names and email addresses. (Kantrowitz 2014) However, in order to be able to track and connect the actions of a single customer over time, they must identify themselves by completing a website contact form (Järvinen & Taiminen 2016). Only the most relevant information should be included in the contact form, as requests that are too in-depth raise the customer's barrier for providing any information or information that is accurate and valid (Long et. al. 2007).

A key advantage of marketing automation software is how informed and accurate it is in automatically delivering the right content to customers. According to Järvinen & Taiminen (2016) marketing automation has two ways of learning about customers: passive and active methods. Passive methods use information from past transactions, such as behavioral trends, and clickstream data, whereas active methods use direct questions to customers, often hand in hand with other content or a link to a website. By collecting this data,

marketing automation software can deliver more personalized messages and content to customers as well as identify at which stage of making a purchasing decision they are in. (Järvinen & Taiminen 2016)
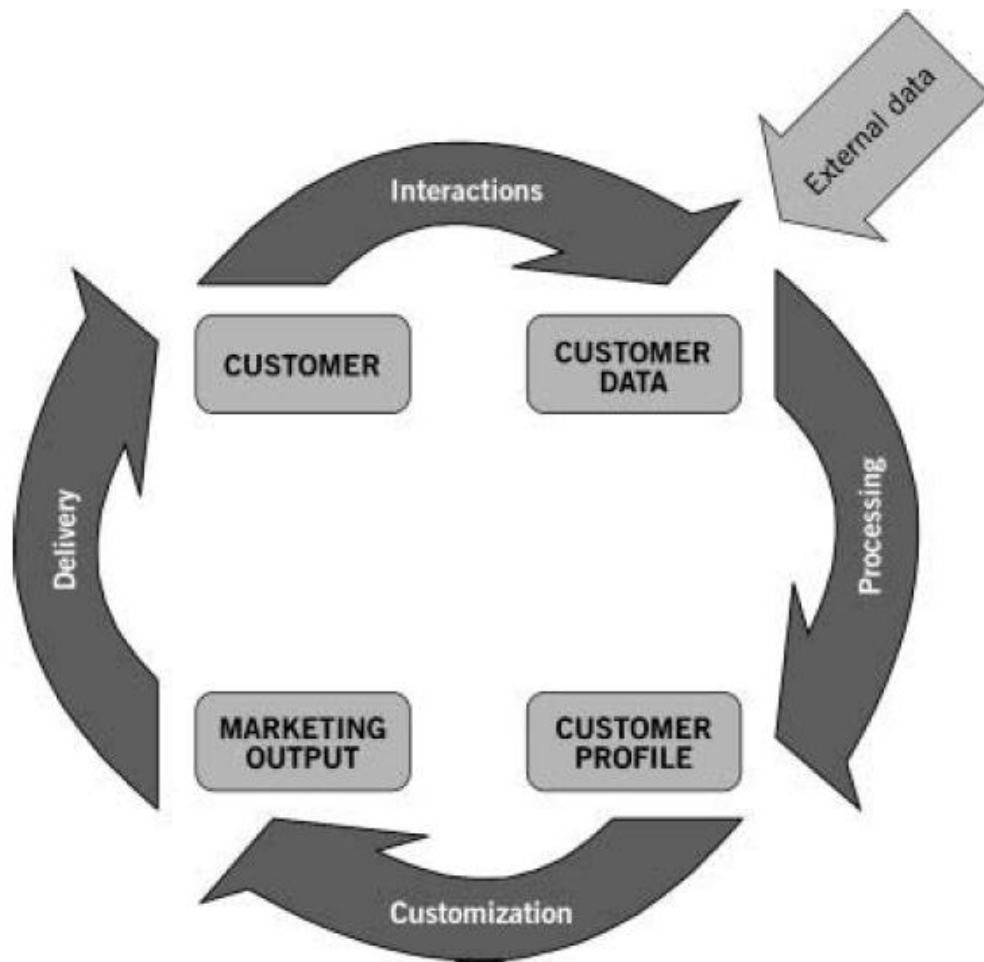
3.1.2. Personalization

A key feature of marketing automation and marketing automation software is delivering personalized content automatically that meets the specific needs of customers. This is called personalization (Kantrowitz 2014; Vesanen 2007). Montgomery & Smith (2009) refer to personalization as the customization of marketing mix elements at an individual level. Some scholars also include customization of e.g. products in their definition of personalization (e.g. Vesanen & Raulas 2006), however this has been deliberately separated from the definition of personalization by Montgomery & Smith (2009) who view personalization specifically within the context of the internet. Heimbach et. al. (2015) argue that modifying content to be more personal has a positive effect on the efficiency of interactions and on creating relationships with customers. Holliman & Rowley (2014) add that by identifying in which stage of their buying cycle customers are, companies, specifically those in the business-to-business sector can personalize marketing content more accurately to reap bigger gains.

For personalization to be efficient, it requires information about the specific customer's behavior and prior interactions or that of similar customers as well as sufficient content which can be personalized (Järvinen & Taiminen 2016; Kantrowitz 2014). The ability of marketing automation software to perform the personalization of content automatically and at scale has been incremental in its rapid popularity with marketers (Kantrowitz 2014).

The process of personalization is described by Vesanen & Raulas (2006) as a recurring process in which data from both the customer as well as external data from e.g. analytics or historical transactions drives the personalization process. Together with details of the customer's profile this data can be used to differentiate the delivered marketing output, and the effects of this personalized content can be used to gather further data to support future

interactions of the customer and other customers. (Vesanen & Raulas 2006) This framework of personalization is presented below in Figure 4.

Figure 4. The process of personalization (Vesanen & Raulas 2006)

3.2. The marketing and sales funnel

By its nature, marketing automation encompasses most of the marketing and sales process of a company as it guides customers through their buying process. This marketing and sales process overview is most often depicted through a marketing and sales funnel. The funnel, sometimes called the marketing funnel, sales funnel or purchase funnel, describes a company's customer acquisition process and divides the process into stages in the funnel (D'Haen & Van den Poel 2013). There are many variations on how the funnel and its stages

are defined and structured, as is identified e.g. by D'Haen & Van den Poel (2013). In this paper the funnel will be broadly referred to as the marketing and sales funnel.

The marketing and sales funnel visualizes the number of prospective customers that are in each stage of the buying process as defined by the company through its funnel-like shape. The path taken by a prospective customer is not always linear, however, as they may move back and forth in the funnel over time. An advantage of marketing automation is that even if a prospective customer is lost at some point of the funnel, their information is kept in the software's database and they may re-enter the funnel at any time. (Järvinen & Taiminen 2016) A marketing and sales funnel also often describes what steps or methods are used to qualify prospective customers to the next stage of the funnel. (Cooper & Budd 2007)

There have been several studies conducted on the marketing and sales funnel and its conceptualization. For example, D'Haen & Van den Poel (2013) propose a sales funnel with four defined stages for acquiring prospective business-to-business customers. These stages are: suspects, prospects, leads and customers. They define suspects as all possible future customers, prospects as suspects that meet certain predefined criteria and rules, leads as prospects that are to be contacted as they have been qualified as the most likely to respond and offer profitable sales, and customers as leads that become clients of the company. Monat (2011) specifically highlights that leads have expressed a recorded interest in the company's offering, and that they may be either new prospects or existing customers. In relation to qualifying prospects into leads and customers, Long et. al. (2007) highlight that prospects that identify themselves by inquiring about a company's offering give a strong indication of their willingness to buy. They are also more inviting towards dialogue through email and other channels. (Long et. al. 2007) The funnel by D'Haen & Van den Poel (2013) is presented below in Figure 5.
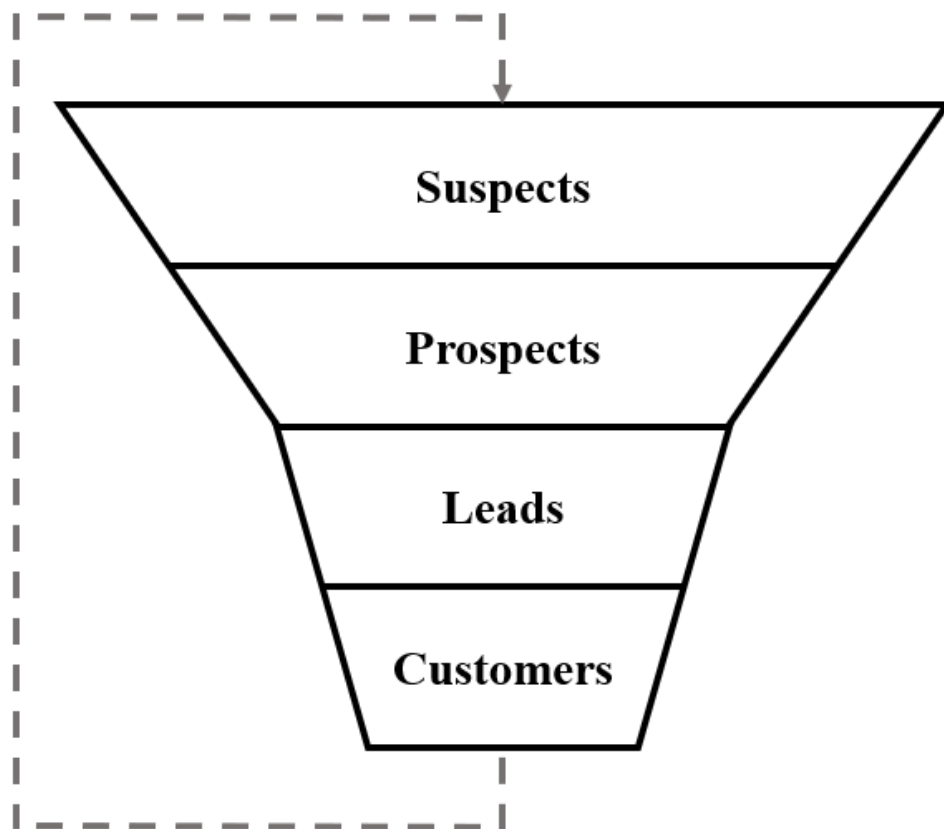
Figure 5. Traditional marketing and sales funnel (modified from D'Haen & Van den Poel 2013).

Järvinen & Taiminen (2016) present a modified version of D'Haen & Van den Poel's funnel which looks at the funnel specifically from a marketing automation point of view. The marketing & sales funnel of Järvinen & Taiminen is based on the marketing and sales funnel identified to be in use by the case company in their single-case study. This funnel features five stages, along with a defined division into marketing automation-driven marketing operations, customer relationship management software-driven sales operations, and information technology integration between the two. The funnel is displayed below in Figure 6.
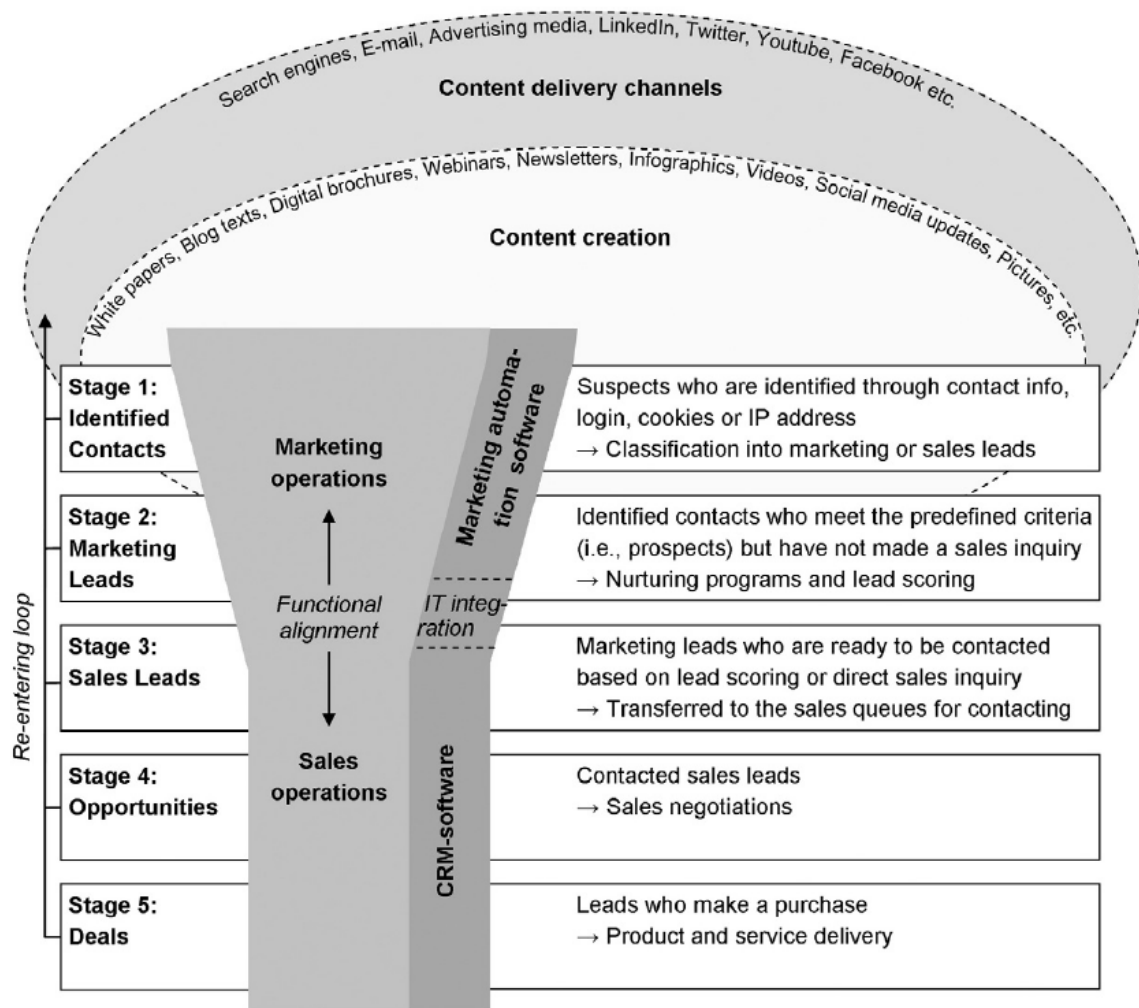
Fig. 2. Marketing and sales funnel of the case company.

Figure 6. Marketing and sales funnel based on a studied case company (Järvinen & Taiminen 2016).

The marketing automation-centric focus of this marketing and sales funnel makes it highly relevant for the purposes of this paper, however it is important to note that only the first three funnel stages of identified contacts, marketing leads, and sales leads are directly linked to marketing automation. Furthermore, this funnel excludes the first stage of the funnel as presented by D'Haen & Van den Poel (2013) which is suspects, i.e. non-identified contacts. Instead, the funnel provides a listing of used content and their delivery channels.

For the purposes of this paper the inclusion of suspects is of significant relevance, which is why the original conceptualization of the marketing and sales funnel by D'Haen & Van den Poel (2013) is primarily used throughout this paper. The marketing and sales funnel

by Järvinen & Taiminen should not be completely discarded, however, as it does include additional relevant information from a marketing automation perspective which is related to areas such as online distribution channels and digital marketing content, as well as actions for each stage of the funnel. Ultimately in practice, the marketing and sales funnel varies from company to company and depends on how the company views their marketing and sales processes.

3.3. Lead nurturing and lead scoring

A prominent feature of many marketing automation software solutions is tracking and scoring all prospective customers and their actions through what is called lead nurturing. Ginty et. al. (2012) define lead nurturing as building a relationship with prospective leads by engaging with the ones who are not yet ready to buy from, or get in touch with, the company. This eventually moves them towards a possible sale and strengthens the link between the company's brand and the offering for when the customer eventually makes a purchasing decision. (Ginty et. al. 2012) Järvinen & Taiminen (2016) similarly refer to lead nurturing as a relationship-building approach in which personalized content is sent to an identified prospective customer in support of their buying process until they are determined to be ready to be transferred to the sales department. They found that the interviewees in the case company they studied referred to lead nurturing as all actions which are being used to transform marketing leads into sales leads.

Ginty et. al. (2012) notes that within the lead nurturing process prospective customers can be engaged with two distinctive approaches: proactively serving them with relevant personalized content, or by reactively delivering content after an action performed by them. These rules and criteria should be defined within the marketing automation software that is in use. Järvinen & Taiminen (2016) agree that information technology platforms, such as marketing automation software, can be used to more efficiently nurture, score and select qualified sales leads.

Ranking and qualifying leads based on their likelihood to buy from a company is referred to as lead scoring. Lead scoring is an integral part of tracking the lead nurturing processes

of a company. Ginty et. al. (2012) note that by combining lead nurturing efforts with lead scoring a company can track the performance of marketing activities their prospective customers have been targeted with, as well as gain insights into the actions, interests and intentions of the customer. Lead scoring can also be used to find out which actions are best to continue with in lead nurturing. (Ginty et. al. 2012; Järvinen & Taiminen 2016)

The importance of lead nurturing and lead scoring is highlighted for example by Oracle, a vendor for marketing automation and lead nurturing software, who together with SiriusDecisions found that from the sales representatives they studied 20% of all possible leads were contacted based on which ones were most likely to buy, but 70% of these leads were not sales qualified and not ready to buy from the company. However, 80% of these non-qualified leads ended up purchasing within 24 months, either from the company or another vendor. (Oracle 2016)

As the starting point of lead scoring, Ginty et. al. (2012) propose a matrix-structured model which combines explicit and implicit data to rank leads. They define explicit data as information about the lead and implicit data as information about the lead's actions. Järvinen & Taiminen (2016) noted that the case company in their single-case study also used explicit and implicit data as the basis for scoring leads. However, defining what data is most relevant for defining the best leads can prove difficult to companies as there is no clear consensus over which traits of a lead are the most important. It is up to the company to define the features which are most relevant for their business case. (Monat 2011)

Defining the explicit score of a lead starts with the identification and definition of an ideal lead, including details such as their job title, company size, industry, volume of business or financial resources (Long et. al. 2007). This ideal lead should be assigned the maximum lead score, which in most marketing automation software is 100 points. The most important elements should be weighted to give more value in the scoring. The implicit score, on the other hand, should be constructed based on actions taken by the lead. These can be, for example, watching a video on the company website or downloading a whitepaper. These actions should also have a weighted scoring as some actions show more content for executing a purchase. (Ginty et. al. 2012)

After the explicit and implicit scoring methods have been defined they should be merged together into a matrix structure. The example provided by Ginty et. al. (2012) is to rank explicit scores as A to D and implicit scores as 1 to 4, thus creating a 4x4 matrix. The weighting can be, for example, classifying anyone with a score of 76-100 as A or 1, 51-75 as B or 2, 26-50 as C or 3, and 0-15 as D or 4. This setting for segmenting leads was adopted by Ginty et. al. from Oracle. (Ginty et. al. 2012) Interestingly, the study by Järvinen & Taiminen (2016) also finds that the case company they studied uses a 4x4 matrix for scoring leads, with leads similarly ranked from A to D and 1 to 4 on the different axes of the matrix. This scoring matrix is illustrated in Figure 7 below.

Figure 7. Illustration of the lead scoring matrix (based on Ginty et. al. 2012)

After the lead scoring matrix has been defined, the company should decide which sectors of the matrix are considered to consist of qualified leads that will be subject to further

actions, such as transferring to the sales department, and which ones will be nurtured further or discarded (Ginty et. al. 2012). The final scoring matrix should be used to identify which segments of leads possess the highest probability of converting from a lead to a purchase (Monat 2011). Järvinen & Taiminen (2016) note that this segmentation of leads by explicit and implicit data can also be used to more accurately personalize content for leads should they be subject to further nurturing.

3.4. Inbound marketing

During recent years companies have begun altering their marketing practices with the emergence and prominence of the internet to better reach and satisfy their customers' needs. During this process they have shifted their marketing efforts more towards what is called inbound marketing. (Opreana & Vinerean 2015)

Inbound marketing is a different approach to the traditional disruptive 'push' marketing, as inbound marketing aims to 'pull' people in by sharing relevant and helpful information and generating useful content for customers (Halligan & Shah 2014). Järvinen & Taiminen (2016) and Holliman & Rowley (2014) similarly describe inbound marketing as pull marketing where compelling content is created to meet the needs of information-seeking leads. Opreana & Vinerean (2015) refer to inbound marketing as digital inbound marketing to strictly refer to it in the online environment. They define digital inbound marketing as "the process of reaching and converting qualified consumers by creating and pursuing organic tactics in online settings". Opreana & Vinerean (2015) also list the key differing features of traditional marketing and digital inbound marketing in their paper. These can be found below in Table 2.

Table 2. Differences between traditional and digital inbound marketing (modified from Opreana & Vinerean 2015)

	Traditional Marketing	**Digital Inbound Marketing**
Basis	Interruption	Organic
Focus	Finding customers	Getting found by potential, existing and aspirational customers
Aim	Increased sales	Creating long-lasting relationships by reaching and converting qualified customers
Target	Large audiences	Interested prospects
Tactics	Print advertisements TV advertisements Outdoors advertising Cold calling Trade shows Email lists	Blogs, E-books, Whitepapers Videos on YouTube, Vimeo, etc. Search engine optimization tactics Infographics Webinars Feeds, RSS (Rich site summary) Social media marketing tactics

Opreana & Vinerean (2015) claim there are four components that make up digital inbound marketing in practice: (digital) content marketing, search engine optimization (commonly referred to as SEO), social media marketing and brand-focused marketing communications.

Holliman & Rowley (2014) define digital content marketing in the business-to-business setting as the practice of producing and distributing relevant and valuable content which "engages customers at the appropriate point in their buying consideration processes", ultimately with the aim of realizing this engagement to a desired business-building result. Järvinen & Taiminen (2016) also employed this definition of digital content marketing in their paper as it emphasizes how digital content marketing is an inbound marketing technique. They also find that the interviewees of the case company in their study referred to (digital) content marketing as "the process of creating and delivering content to target customers in ways that add value and engage them in relationships with the company". Järvinen & Taiminen (2016) find that many authors refer to content marketing simply as

any marketing that is conducted in a digital environment, even without the 'digital' prefix for the term.

Distinguishing inbound marketing from content marketing has created some confusion among practitioners as the two terms have often been used synonymously, as is examined by e.g. HubSpot (Chernov 2017) and Holliman & Rowley (2014). Chernov (2017) conducted a survey on behalf of HubSpot with over 3500 marketing and sales professionals and conclude that based on the responses from their survey participants, content marketing is a subset of inbound marketing. Holliman & Rowley (2014) similarly position digital content marketing as an inbound marketing technique. Content can therefore be seen as the fuel that drives the engine of marketing automation as it provides the core for engaging with potential customers.

Halligan & Shah (2014) list whitepapers, videos, blog articles, infographics, webinars and podcasts as some of the forms of online material utilized by companies in digital content marketing. Järvinen & Taiminen (2016) add to this list by listing digital brochures, newsletters, social media updates and pictures as forms of digital marketing content in their marketing and sales funnel from Chapter 3.2.

The importance of digital content marketing as a means of inbound marketing has been successfully captured by previous studies. For example, a Corporate Executive Board study which reviewed over 1400 B2B buyers and their purchasing processes discovered that 60% of what is considered as making a purchasing decision process was completed before getting in touch with a salesperson (Adamson et. al. 2012). As Järvinen & Taiminen (2016) point out in reference to this study, buyers play an increasingly active role in searching and evaluating information that make up their purchasing decision. Companies have generally reacted to this by producing and promoting content that aims at providing their potential customers with information on the business and use cases of their offerings, rather than focusing on their offerings directly.

Some of the other identified aims and potential benefits of employing digital content marketing in a business-to-business context include lead generation in the form of new and existing customers, changing and reinforcing customer behavior and opinions, and

strengthening the company's brand and trustworthiness (Halligan & Shah 2014; Holliman & Rowley 2014; Opreana & Vinerean 2015). Brand-focused marketing communications, as mentioned earlier, is another component and technique of digital inbound marketing. Järvinen & Taiminen (2016) also discovered that when paired together with marketing automation, digital content marketing increases the quality and amount of sales leads as well as improves efficiency levels of the entire marketing and sales process depicted by the marketing and sales funnel.

In addition to digital content marketing, online marketing channels are also a pivotal part of marketing automation to ensure potential customers reach the right content. Social networks have drastically affected how information, such as digital marketing content, is spread and shared across the internet. Social media platforms have also allowed companies new ways of building their brand in unison with their digital content marketing activities. Companies have more options for reaching out to their potential customer bases through the multiple new online channels that exist. (Opreana & Vinerean 2015)

The internet has also provided consumers with search engines where they can search for literally anything online. This provides another pull method for companies as they engage in what is referred to as search engine optimization to ensure their website and offerings are prominently featured for consumers who search with select key words. Search engine optimization is an online marketing method where the position of a website is optimized in search engine results pages based on what the user is searching for. Keywords, webpage optimization, content creation and building links around them are some of the actions included in search engine optimization. As was highlighted before, consumers are increasingly searching for information rather than brands and their offerings in the beginning of their purchasing path, making search engine optimization a key technique for driving suspects and prospects in the beginning of their purchasing process to a company's website and content. (Opreana & Vinerean 2015)

Inbound marketing in practice is the usage of all of the aforementioned components in unison. Most often digital marketing content is hosted on the company's website while other online channels are deployed to promote and drive customers to the various content on the website. These additional online channels include, for example, search engines such

as Google and Bing, email, social media platforms such as Facebook, LinkedIn, Twitter and YouTube. While some content is often accessible without any restrictions, accessing other material requires logging in or providing contact information. (Järvinen & Taiminen 2016) This, along with tracking visitors' actions and behaviors across channels and web pages, is how marketing automation ties to inbound marketing.

Despite its importance and relevance, Järvinen & Taiminen (2016) find that academic research conducted on business-to-business digital content marketing is very thin, and most knowledge on the subject is based on studies conducted by commercial research institutions. Holliman & Rowley (2014) similarly agree and note that research on both content marketing and inbound marketing in general is "virtually non-existent".

3.5. Relationship marketing

Another marketing theory that ties into marketing automation is relationship marketing. Relationship marketing, as the name suggests, is focused on the relationship between a company and their customer. Relationship marketing rose to prominence in the 1980s as the then-dominant transaction marketing theory, firmly built around the 4P's or marketing mix concept formulated by McCarthy in 1960, was seen as insufficient by both service marketing and industrial business-to-business marketing academics (Grönroos 2004). Relationship marketing was first introduced by Berry in 1983, however as Grönroos (2004) points out, focusing on relationships in customer transactions is not a new phenomenon.

Relationship marketing has since developed and branched out into many directions, with scholars and practitioners not in unanimous agreement on what the exact definition for relationship marketing is specifically (Gummesson 2017; Sheth 2017). Sheth (2017) highlights that to some relationship marketing can, for example, mean customer relationship management (often abbreviated to CRM), while to others it may mean after-sales marketing activities and customer support. Gummesson (2017) therefore broadly states that relationship marketing tries to comprehend the many aspects related to a supplier's activities in attracting, winning, building, maintaining, enhancing and terminating relationships. Moreover, the aim should be to make these relationships

"enjoyable, enthusiastic, ethical and personally and professionally rewarding win-win relationships". (Gummesson 2017) Grönroos (1994) similarly defines relationship marketing as "identifying and establishing, maintaining and enhancing, and when necessary, also terminating relationships with customers and other stakeholders, at a profit, so that the objectives of all parties are met, and that this is done by a mutual exchange and fulfilment of promises". It is important to highlight that a key differentiator in relationship marketing in comparison to transaction marketing is that it also focuses on retaining customers instead of only acquiring new ones.

Grönroos (2004) argues that in addition to the transaction of products and services, relationship marketing offers additional value to both the customer and the supplier. For the customer these can include, for example, security, reduced costs and a feeling of control and trust (Grönroos 2004), whereas for the supplier these can include customer loyalty, profitability and insights into customers' preferences (Gummerus et. al. 2017). Christopher et. al. (2002) note that retaining customers has been studied to being significantly more cost-efficient for companies in comparison to the monetary efforts needed in obtaining a new customer. Christopher et. al. (2002) also highlight the importance of personalized relationships with customers as a requirement for fully realizing the benefits of relationship marketing.

In their viewpoint paper from 2017, Gummesson notes that online marketing and social media have been key drivers of change in the field of relationship marketing over recent years, attracting more attention to relationship marketing research in the process. Online marketing and social media are seen as rapidly changing market conditions as well as potentially changing the meaning of relationships, networks and interactions. The understanding of relationship marketing in the online domain is concluded to currently not being understood in full. (Gummesson 2017)

Relationship marketing can be seen as covering nearly all aspects of the marketing and sales funnel processes from the perspective of building customer relationships. Relationship marketing ties fittingly into the essence of marketing automation as it strives to build a relationship with customers. These relationships are most commonly approached by utilizing inbound marketing techniques while monitoring the evolvement of these

relationships through lead nurturing practices. Moreover, relationship marketing goes beyond the marketing and sales funnel's scope in understanding customers' purchasing processes as it also encompasses the maintenance of the relationship after the initial sales process, at best resulting in repeat sales, a longer service agreement or as an additional marketing resource as an advocate of the company and its offerings.

4. LINKING THE CUSTOMER JOURNEY TO MARKETING AUTOMATION

As is evident from existing literature, connections between the customer journey and marketing automation exist. To some extent, the two concepts are already being used side by side in some organizations to reap benefits for more efficient and customer-centric usage of marketing automation (Wolny & Charoensuksai 2014). However, no framework for how customer journey concept is used in marketing automation exists. To conceptualize the customer journey's impact when used to support marketing automation, the key components from both disciplines of theory will be identified and examined. After this, the links between the components of both sets of theory will be discussed before finally presenting a visualization of the potential framework combining marketing automation with the customer journey concept.

Interestingly, customer journey maps are already being used for marketing automation purposes in some extent as is identified e.g. by Wolny & Charoensuksai (2014). Customer journeys are perceived to provide valuable information for successfully and effectively guiding customers through the marketing and sales processes of a company.

Some indirect links were also observed in the reviewed literature. For example, Sauro (2015) argues that a customer journey map is similar to the marketing and sales funnel as they both visualize the phases a customer goes through when interacting with a company and their offering. They both include pre-defined stages that have many similarities. Wolny & Charoensuksai (2014) define some of the shared features of customer journey maps and marketing automation solutions as matching customer journey stages to the respective relevant marketing automation activities. They also claim that customer journeys provide information for matching the right marketing strategy and digital marketing content to the right customer to provide them with digital marketing content personalized by their needs at the right stage of the customer journey. (Wolny & Charoensuksai 2014) These stages could be identified in marketing automation e.g. by lead scoring.

4.1. Key components

The customer journey is defined as a depiction of a customer's interaction with a company, consisting of a given number of sequential touchpoints which describe the service from the user's perspective (Stickdorn & Schneider 2011; Norton & Pine 2013; Lemon & Verhoef 2016). In this research paper the customer journey is defined to also include the persona and touchpoint concepts, while the practice of using the customer journey concept is referred to as customer journey mapping, followed by customer journey analysis. A persona is defined as a fictional presentation of a person that represents and merges patterns that have been identified from the research insights (Moritz 2005). A touchpoint is defined as a specific point of interaction between a company and a customer within the customer journey (Zomerdijk & Voss 2010). Customer journey mapping is defined as the activities performed to visualize and analyze an existing service process as-is (Følstad & Kvale 2018; Stickdorn & Schneider 2011). Customer journey analysis is defined as the process of studying and investigating the customer journey, often after it is mapped, with the aim of identifying key issues (Lemon & Verhoef 2016).

The key customer journey components and their definitions are presented in Table 3 below.

Table 3. The key components of the customer journey concept.

Key Component	Definition
Customer Journey	A depiction of a customer's interaction with a company, consisting of a given number of sequential touchpoints which describe the service from the user's perspective (Stickdorn & Schneider 2011; Norton & Pine 2013; Lemon & Verhoef 2016).
Touchpoint	Specific points of interaction between a company and a customer within the customer journey (Zomerdijk & Voss 2010).
Persona	A fictional presentation of a person that represents and merges patterns that have been identified from the research insights (Moritz 2005).
Customer Journey Mapping	The activities performed to visualize and analyze an existing service process as-is for the ultimate purpose of analyzing it (Folstad & Kvale 2018; Stickdorn & Schneider 2011).
Customer Journey Analysis	The process of studying and investigating the customer journey, often after it is mapped, with the aim of identifying key issues (Lemon & Verhoef 2016).

Marketing automation is defined broadly as a combination of processes and technology used for the automatic personalization of relevant and useful content to meet and satisfy the needs of potential customers (Järvinen & Taiminen 2016). Noteworthy components of marketing automation in this research paper are marketing automation software and personalization. Personalization is defined as the modification and selection of digital marketing content that is distributed to customers in order to meet their needs (Kantrowitz 2014; Vesanen 2007). Marketing automation software is defined as the information technology tool used to automatically track and nurture customers as well as personalize and distribute digital marketing content to customers.

As marketing automation does not encompass a single holistic discipline of marketing theory but considers many of its facets, the concepts of marketing and sales funnel, lead nurturing, inbound marketing and relationship marketing were identified and selected to provide thorough understanding for bridging the understanding between the customer journey and marketing automation concepts as well as the creation of a framework. The

marketing and sales funnel is defined as a visual representation of a company's customer acquisition process, including the company's marketing and sales functions, in the form of a funnel and divided into stages (D'Haen & Van den Poel 2013). Lead nurturing is defined as a relationship-building approach in which personalized content is sent to an identified prospective customer in support of their buying process until they are determined to be ready to be transferred to sales (Järvinen & Taiminen 2016). Lead scoring is a sub-set of lead nurturing; it can be defined as the (automated) process of ranking and qualifying leads based on their likelihood to buy from a company (Ginty et. al. 2012) Inbound marketing is defined as a 'pull' approach with the aim of reaching and converting qualified customers tactics such as digital content marketing, search engine optimization and social media marketing (Halligan & Shah 2014; Opreana & Vinerean 2015). Finally, relationship marketing is defined as the processes of identifying, establishing, maintaining, enhancing and terminating relationships as a means of creating mutual value between all involved parties (Grönroos 1994; Gummesson 2017).

The key components and their definitions are presented in Table 4 below.

Table 4. The key components of the marketing automation concept.

| Key Component	Definition
Marketing Automation	A combination of processes and technology used for the automatic personalization of relevant and useful content to meet and satisfy the needs of potential customers (Järvinen & Taiminen 2016)
Marketing Automation Software	The information technology tool used to automatically track and nurture customers as well as personalize and distribute digital marketing content to customers.
Personalization	The modification and selection of digital marketing content that is distributed to customers in order to meet their needs (Kantrowitz 2014; Vesanen 2007).
Marketing and Sales Funnel	A visual representation of a company's customer acquisition process, including the company's marketing and sales functions, in the form of a funnel and divided into stages (D'Haen & Van den Poel 2013).
Lead Nurturing	A relationship-building approach in which personalized content is sent to an identified prospective customer in support of their buying process until they are determined to be ready to be transferred to sales (Järvinen & Taiminen 2016).
Lead Scoring	Lead scoring is a sub-set of lead nurturing; it can be defined as the (automated) process of ranking and qualifying leads based on their likelihood to buy from a company (Ginty et. al. 2012)
Inbound Marketing	A 'pull' approach with the aim of reaching and converting qualified customers tactics such as digital content marketing, search engine optimization and social media marketing (Halligan & Shah 2014; Opreana & Vinerean 2015).
Relationship Marketing	The processes of identifying, establishing, maintaining, enhancing and terminating relationships as a means of creating mutual value between all involved parties (Grönroos 1994; Gummesson 2017).

4.2. The conceptual framework

The aim of this study is to understand how the customer journey affects marketing automation. To showcase this in the form of a framework, the starting point for the creation of the framework was setting the components of the customer journey as independent variables, and the components of the marketing automation concept as dependent variables. Independent variables are not dependent or influenced by other variables, whereas dependent variables are influenced by other variables, as the name would suggest. In this case, it is the independent variables that act as drivers for the dependent variables.

The constructive research approach was used to construct the framework conceived during this research. As Lehtiranta et. al. (2015) note, there is no generalized method or process for creating a framework, as it is heuristic and creative by nature. Constructive research relies notably on the interpretation of the researcher (Lehtiranta et. al. 2015). In this paper the framework is constructed by first identifying the variables that are involved in the creation of the framework, after which their dependencies and outputs are examined and matched to each other. Explicit connections between the variables are also taken into consideration. Based on the obtained information and insights on the variables a framework should ultimately be presented.

Some of the identified marketing automation and customer journey variables did not inherently link to the initial versions of the drafted framework directly, but rather described the overall processes of integrating the customer journey's output into marketing automation. Specifically, the customer journey mapping and analysis components do not link to any of the marketing automation functions directly. These are instead separated from the rest of the variables and added to the framework to showcase the overall process of how the customer journey and marketing automation are combined in the framework. Albeit not discussed in this paper, setting up the marketing automation solution makes up for the final stage of this process. This phase is in the scope of this paper carried out by the marketing automation solution provider, i.e. Biit, as part of their solution delivery.

Based on the aforementioned settings, a framework for how the customer journey can be utilized in marketing automation is conceived. It consists of the identified customer journey

and marketing automation components, process phases as well as linkages between the different variables. This proposed framework is presented below in Figure 8.
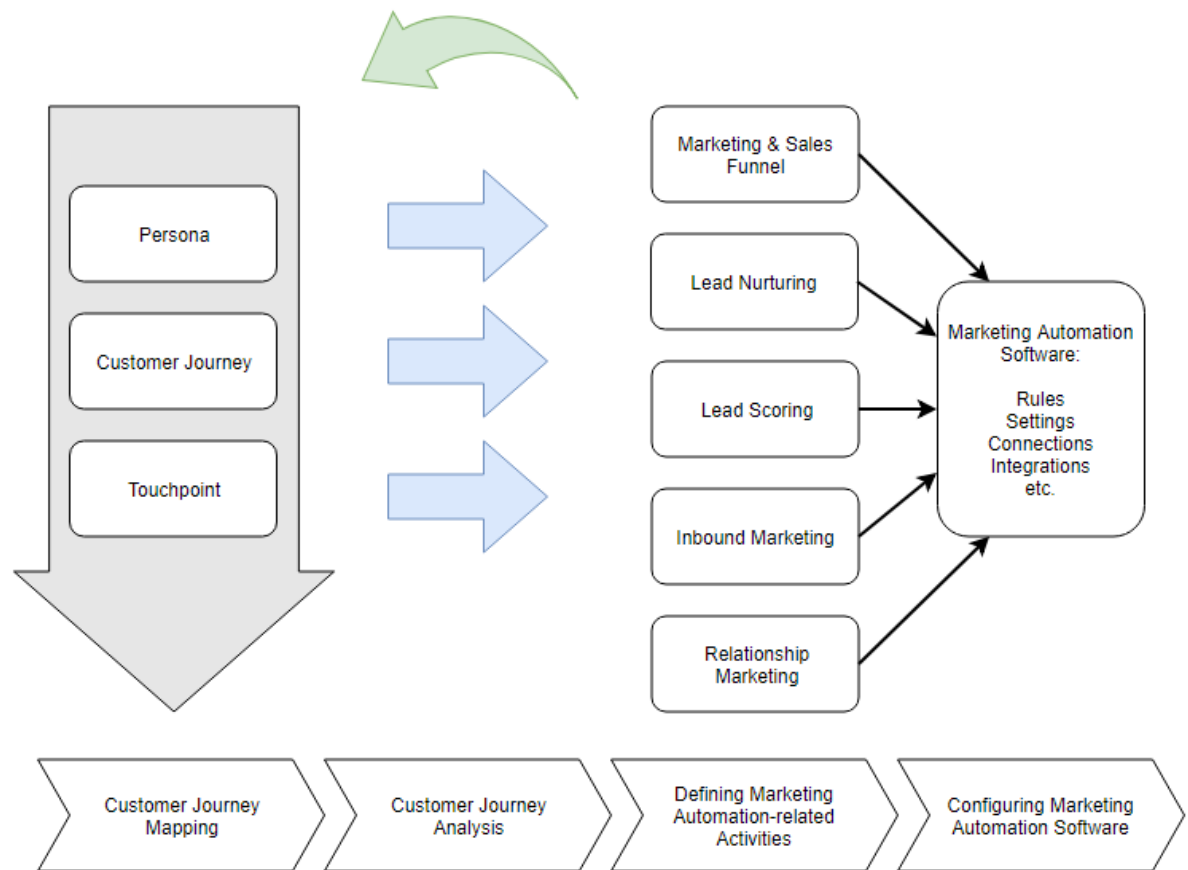
Figure 8. The proposed framework for integrating the customer journey concept with marketing automation.

The framework is divided into four specific process phases, which further include the specific variables identified from literature and their connection symbolized by arrows. The discussion of the framework and its constituent parts, including argumentation regarding its conceptualization, is covered next in Chapter 5.

5. DISCUSSION AND ANALYSIS

This chapter discusses and analyses the proposed framework in Chapter 4.2 and presents argumentation regarding its formulation. The key findings and identified deficiencies are also analyzed. The overall process phases presented in the framework are presented first, followed by a more in-depth look at some of the possible links between customer journey components and marketing automation components. Finally, the findings of this study and framework are analyzed and reviewed.

5.1. The process phases of utilizing the customer journey in marketing automation

The basis for the proposed framework proposed in this paper are the processes in progressing from customer journey mapping all the way to a fully-fledged marketing automation solution, including software, while taking up all of the relevant considerations along the way makes up. As was mentioned before in Chapter 4, these process phases are inherently different from the other variables in the framework.

Furthermore, this framework excludes other phases outside the realm of what has been studied in literature within this paper that may or may not be linked to processes in this framework. These processes could for example be phases that take place before or after the processes described in the framework, such as sourcing needed data for the customer journey process phases, selecting which persons should be included in the customer journey mapping process, training marketing automation end-users.

The first process phase of the framework is customer journey mapping. As Stickdorn & Schneider (2011) state, customer journey mapping is the process of visualizing and defining an existing service process, ultimately with the purpose of analyzing it. As the customer journey mapping requires insights and input from the observed company, it is crucial to involve select members of the company in the customer journey mapping process.

Customer journey mapping is presented in the framework as an arrow depicting the somewhat sequential steps that it consists of. Sauro (2015) presents that the process of mapping a customer journey starts from selecting the personas for which the customer journey is to be mapped. After this, the stages and smaller descriptive steps of the customer journey, as well as their drivers, are discussed, defined and presented visually. Finally, the customer journey is completed by defining the sequential touchpoints within these defined stages and steps. Additionally, it is important to also identify the needs, activities, obstacles and other aspects of a customer journey that a persona is faced with during their journey in each stage and touchpoint.

After the customer journey has been mapped in its entirety the process of analyzing the customer journey may begin. Stickdorn & Schneider (2011) argue that analyzing the customer journey map makes it possible to identify problematic areas as well as specific parts of the journey, especially so-called "moments of truth". Lemon & Verhoef (2016) add to this by stating that the focus should be in understanding the journey and its components from the persona's point of view in order to identify key outputs. In addition to identifying actionable findings and outcomes, the aim should be on understanding how and why they drive other dependent functionalities for example in marketing automation. Depending on the company, the personas, the area of business as well as other factors, the gathered outcomes and conclusions that are made from customer journey analysis can be endless. How the customer journey outputs potentially link to the marketing automation paradigm is discussed in more detail in Chapter 5.2.

After the customer journey has been rigorously analyzed and the key outputs identified they need to be fitted into the marketing automation paradigm. This means understanding how the customer journey outputs are transformed into marketing automation-related activities and what they imply, and then formatting them to fit this paradigm to ensure that they can be implemented both as methods and within the marketing automation software that is used and configured in the next phase of the framework. From the perspective of this paper the main components of the marketing automation concept for setting up this fitting are the marketing and sales funnel, lead scoring and lead nurturing, inbound marketing and relationship marketing concepts.

Finally, once the customer journey outputs have been transformed into decisions and actionable items they can be implemented and configured into the underlying marketing automation software. These most often include defining lead nurturing activities and actions, lead scoring rules, setting uplinks and tracking to marketing channels such as social media and the company website, search engine optimization, defining and building marketing actions such as call-to-action forms, landing pages, and so on, also depending on what software is being used.

5.2. The links between the customer journey and marketing automation

A myriad of possible links between the customer journey components and the marketing automation components can potentially exist and be identified during customer journey analysis. This chapter will discuss some of the links that are deemed significant and either directly named in literature from both customer journey and marketing automation topics or links that are indirectly implied in literature findings, with the inclusion of abductive reasoning to define the most logical connections.

One of the most obvious linkages between the customer journey and marketing automation is that between the customer journey stages and marketing and sales funnel stages. This link was also identified and suggested in the reviewed literature (e.g. Wolny & Charoensuksai 2014; Sauro 2015). The number, criteria and definitions of these stages may vary from company to company depending on factors such as the business environment and types of customers. As marketing automation aims to cover the phases and actions defined with the marketing and sales funnel, any implications from the customer journey to the funnel are likely to have an effect on the marketing automation solution.

It is important to note, however, that e.g. Sauro (2015) suggests using the existing stages from the marketing and sales funnel in the customer journey and not the other way around. The customer journey literature also views these stages as pre-defined within which the customer journey is then placed. In a way it can be argued that the marketing and sales funnel actually dictates how the customer journey is to be set up and used, but ultimately the stages could potentially be changed during the customer journey mapping phase, be

different altogether to those of the marketing and sales funnel, or a defined marketing and sales funnel may not even exist. This implies that the sales funnel stages could or should be modified based on the defined customer journey stage structure.

Regardless of which component influences which more, the two are related and may influence each other, and aligning the stages in both the funnel and the journey makes for the most logical solution and should therefore be the aim when setting up a marketing automation solution. Aligning the marketing automation stages and the customer journey stages should also ensure the most cohesive, simple and logical setup for aligning the rest of the customer journey's constituent components and outputs. This approach is also recommended by Sauro (2015). It is therefore that a feedback loop arrow has been added to the framework to showcase that the marketing and sales funnel can, in some cases, be the independent variable that the customer journey stages are dependent upon. Furthermore, other two-way dependencies can also exist.

The customer journey can also highlight the complexity of customers' purchasing decision processes. This, to some extent, draws input also from the persona to which the journey is assigned to. This length and complexity of a journey has implications for lead scoring and lead nurturing: in some business areas, or with specific offerings, purchasing decision processes can be more fast-paced and lead cycle times may be shorter than with other business areas or offerings. This should be reflected in lead scoring, for example by giving out less points for touchpoint interactions within those identified journeys that are notably longer than others, and in lead nurturing, for example by setting up the nurturing-related marketing activities such as campaigns to reflect this journey length and complexity.

Likewise, understanding at what point of the customer journey a persona identifies themselves (i.e. becomes a prospect in the marketing and sales funnel) and subjects themselves to receiving personalized marketing content is crucial in understanding the remaining length of the journey. Knowing if there are likely to be 2 instead of 20 touchpoints left in the journey after the customer is identified helps in configuring the lead scoring and lead nurturing schemes correctly. These factors may also influence the marketing and sales funnel, especially in understanding the lead cycle times.

The touchpoints of a customer journey can influence the lead scoring configurations of a marketing automation solution. Lemon & Verhoef (2016) state that some touchpoints are more efficient than others, and some might be more important than others. This can therefore influence lead scoring in marketing automation and specifically the lead scoring points accredited to different touchpoint interactions: Reading a blog post may not be as important or efficient as attending a webinar. What happens in touchpoints also influences lead scoring: for example, viewing a 3-minute video in full is more significant than only viewing the first 30 seconds of a 5-minute video.

Lemon & Verhoef (2016) argue that identifying "moments of truth", the most critical touchpoints, is crucial during customer journey analysis. This also makes sense from a marketing point of view: identifying and understanding critical moments as well as their trigger points and handling them accordingly should logically increase the rate of success of related marketing operations. For example, a visit to the web page which lists a company's service prices could be considered a moment of truth when it happens to an identified prospect that is presumably close to making a purchasing decision, which is often manifested by a high lead score, whereas visiting the pricing page when at the beginning of the prospect stage is often less important and regarded as information gathering. Specific lead nurturing rules and actions should be set in place to manage such instances. (Ginty et. al. 2012)

As for example De Haan et. al. (2016) and Lemon & Verhoef (2016) argue, touchpoints can be divided into different categories. One such is company-initiated touchpoints, which are touchpoints that are controlled and proactively managed by the company. These are, quite logically, linked to the different inbound marketing decisions made by the company, such as digital marketing content formats and topics as well as digital marketing channels. These touchpoints are often defined in the customer journey mapping phase by predicting and assuming the behavior and actions of a persona, for example by proposing questions from the perspective of the persona: Wherein and how would the persona 'James Smith' look for more information? Would the persona 'Mary Johnson' rather read a whitepaper or listen to a podcast when commuting to work? (Opreana & Vinerean 2015; Lemon & Verhoef 2016)

Together with the understanding of personas and their perceived behaviors and preferences, company-initiated touchpoints can also be used to define lead nurturing processes. A practical example can for example be defining how often to send digital marketing content such as a newsletter via email to the prospect. (Moritz 2005; Lemon & Verhoef 2016)

Personas are based on identified patterns from real-life customers (Moritz 2005). Personas therefore represent the most important personas or people to target with marketing activities. This has implication for lead scoring and should be taken into consideration when defining the lead scoring in a marketing automation solution. It can be specifically linked to explicit scoring in the lead scoring matrix introduced in Figure 6 in Chapter 3.3 as the identified patterns depict what explicit data is most important (Ginty et. al. 2012; Long et. al. 2007). For example, a company that sells cloud computing solutions will value the lead score of 40 for a CTO more than a score of 70 for an HR trainee, and therefore the importance of this identified explicit data should be taken into consideration (Monat 2011; Lemon & Verhoef 2016).

Form an inbound marketing point of view, personas also signal what type of digital marketing content to produce and spread (Goodwin 2009). If a key persona with a niche field of interest is identified, ensuring that the company has or will develop the necessary marketing content – e.g. videos, blog posts, infographics, webinars, podcasts or whitepapers – that is useful and compelling to this persona is pivotal. Moreover, identified behavioral patterns of personas signal what distribution channels for digital marketing content a company should have in place and prioritize. They can also reveal what format of content a company's customers are interested in.

Finally, many touchpoint interactions that happen over companies' tracked digital marketing channels belong to suspects that never identify themselves as prospects or perform a purchase (Järvinen & Karjaluoto 2015). These touchpoints are only linked to each other and to the customer once they identify themselves and become a prospect, and therefore no further information about the suspects is revealed (Kantrowitz 2014). It is therefore beneficial for companies to identify whether there are any actions that can be taken to convert more of these suspects to prospects. As personas and touchpoints draw insights from identified customers and their traits (Moritz 2005), comparing touchpoint

performance of the defined customer journeys against other data from quantitative metrics such as market segmentation data (Brechin 2008; Goodwin 2009) can potentially help identify, for example, which digital marketing content, channels or other forms of inbound marketing are receiving significantly different amounts of interactions from identified prospects when compared to unidentified suspects. This can help in understanding possible actions that should be undertaken, such as revising digital marketing content that is not performing exceptionally well.

Overall, it can be concluded that understanding the key defined personas and their customer journeys have a holistic effect on what marketing automation-related decisions are made and how in general marketing automation should be set up. A plethora of outputs from the customer journey mapping phase can have countless considerations for each marketing automation component alone. Many of the links covered above cannot be unambiguously identified and defined without rigorous market testing and case data. For example, a link between the persona and inbound marketing, for example, provides little to no descriptive guidance for practitioners as the link context itself is not mentioned. To validate and possibly further develop the framework presented in Figure 8, a comprehensive market test and study should be conducted. Although not included in the scope of this paper, this market validation study is already planned to take place with Biit, the company with which this paper has been done in cooperation with.

5.3. Key findings from the study and framework

A somewhat generalization of the framework and its linkages between the customer journey and marketing automation concepts is that personas and touchpoints tend to influence and affect many of the micro-level actions in marketing automation, such as explicit lead scoring or themes and formats of digital content marketing, whereas the customer journey in its entirety is more geared towards assessing the overall frame of marketing automation and is especially similar to the marketing and sales funnel.

The framework presents the processes and overall components of how the customer journey concept can be utilized marketing automation. It leaves some freedom for interpretation, such as how exactly the components from the customer journey mapping phase connect to marketing automation concepts, as well as to which ones they are linked to. Nevertheless, these links are discussed to an extent in the previous chapter to emphasize the possible linkages they may have. These links will most probably differ from case to case but investigating whether some common patterns emerge is a possible next step in solidifying the web of connections the components from the two frameworks have.

A notable feature of the framework is that the customer journey mapping phase has many long-reaching ramifications as each process phase is dependent on the preceding ones. Therefore, any overlooked or misinterpreted factors early on in the process – notably in the customer journey mapping and analysis phases – can significantly influence the end result and any deficiencies are likely to be magnified in the marketing automation phases. No clearly defined feedback or iterative process is included in the framework; however, one is rather likely to be added once the framework is tested and validated in practice and findings are analyzed.

It is also important to note that many of the marketing automation-related outcomes from the customer journey phases may also not be directly related to the marketing automation software solution, or to marketing in general. This is due to the fact that customer journey mapping and analysis, as holistic service design methodologies, are used to assess the entire service realm of a company from the customer perspective. A key topic of interest will therefore be identifying if the scope of customer journey mapping and analysis can be restricted to only focus on marketing-related issues, or will it compromise the results and findings from these methodologies. As noted earlier, any shortcoming in the customer journey phases have long-reaching effects in marketing automation.

Marketing automation as a concept is not as customer-focused as the other counterpart in the framework, the customer journey. While the customer journey concept aims to view and define all aspects in service delivery specifically from the customer perspective, marketing automation aims to set up the processes and tools for efficiently carrying out marketing activities in an online environment. Naturally the customer should be at the

forefront when putting together the marketing automation setup, but customer-centricity is not solely the target of these activities. Whether or not this presents any additional nuances for integrating customer journey input into marketing automation solutions is to be seen.

An important note is that in addition to the framework presented in this paper, the literature covered in this study form a solid basis for understanding how the customer journey and marketing automation concepts and their constituent components can be interlinked. This was deemed one of the two research objectives specifically from the company Biit, with which this thesis has been done in cooperation with. The framework and knowledge gathered in this paper establishes a solid starting point for future research and studies within this setting.

Some implications and findings for practical use can also be identified from the framework and the used literature. First, aligning the customer journey stages and marketing and sales funnel stages should be done. This helps to better understand and align the linkages between the customer journey and marketing automation concepts as well as simplify the process of aligning the outcomes of the customer journey phases with marketing automation activities. Identifying critical "moments of truth" is seen as a crucial step in identifying the main outputs from a customer journey map and should therefore be paid extra attention to. Utilizing other sources of data, such as clickstream data from web analytics, can provide additional input for formulating marketing automation solutions.

The framework and the preceding study of literature and practices has also identified multiple key tools and methods for companies to use in their customer journey and marketing automation practices. For example, in the customer journey phases, tools such as the 'persona canvas' (Business Design Tools 2018) and the 'customer journey canvas' as mentioned by Van der Pijl et. al. (2016) are discussed. Similarly, within the marketing automation paradigm the 'lead scoring matrix' was presented and visually conceptualized into a 4x4 format, and two examples of 'marketing and sales funnels' that can be utilized and modified for use in cases where a pre-existing funnel does not exist were discussed.

Finally, specific steps and aspects that relate to the challenges identified by the issuing company of this research, Biit, are also identified. Many of these are related to what tools

and processes can and should be utilized when including the customer journey mapping and analysis practices in their line of business, thus bridging the knowledge gap between the customer journey and marketing automation concepts. Furthermore, examining and reviewing the theoretical fundamentals of what marketing automation consists of provides new insights into the delivery of marketing automation solutions. Naturally, the other findings covered above are also closely related to Biit and how they execute the delivery of customer-centric marketing automation solutions.

The framework presented in this paper is planned to be applied in practice to future large-scale marketing automation solution deliveries at Biit. Specifically, the process for using the customer journey concept in marketing automation will be utilized, as well as adopting select components and practices uncovered in this paper, such as the lead scoring matrix. The designed starting point for involving customer experience and the customer journey in marketing automation solution deliveries will be in holding customer journey mapping workshops and emphasizing how personas are constructed and used as well as how the customer journey mapping workshops are analyzed afterwards.

The study and investigation of this topic, however, is not yet over. The next steps for continuing with integration of the customer journey and marketing automation are to test the framework with real-life cases and validate its performance, with adjustments and developments to be done accordingly. Likewise, studies on the missing aspects of marketing automation theories should be addressed to ensure the foundation for a holistic and sound marketing automation theory. These have been noted in multiple theory subsets by a number of researches (e.g. Järvinen & Taiminen 2016; Holliman & Rowley 2014). An interesting and vital inclusion to the follow-up of this paper is to identify how customer satisfaction can be measured through improvements in marketing automation and how significant the change in customer experience is when applying the framework and processes described in this paper into practice. Finally, including supporting concepts, theories and approaches should be explored to complement the scope of this paper. Topics such as behavioral science theories, the omni-channel theoretical concept and many more will likely add additional context to understanding how the customer journey approach can be used in conceptualizing marketing automation solutions.

6. CONCLUSIONS

Focusing on customer experience has been identified as a key driver of both competitive advantage as well as customer acquisition and retention. The customer journey concept has emerged as one of the most prominent service design methodologies for defining and assessing customer experience. Customer experience happens in so-called touchpoints, i.e. encounters between a customer and a company. Most often these touchpoint interactions occur when customers interact with a company's marketing assets. Marketing automation, the automated process of delivering personalized and timely content to customers with the help of technology and processes, has emerged as a significant tool for managing these touchpoints and customers' paths through the marketing funnel from possible interest to successful sales and retention. However, no studies or guidelines for how exactly the customer journey concept can be utilized in marketing automation have been identified.

The aim of this thesis was to understand how the customer journey concept can be applied in delivering improved marketing automation solution and to develop a framework for describing and facilitating this process. The constructive research approach and abductive reasoning were used as research methodologies as one of the targets of this study was to construct a framework. The research begun with a thorough exploration of both the customer journey and marketing automation theories and their constituent parts. After this, the main variables were identified and their dependencies and connections to other variables were discussed and presented in the form of a framework. Finally, the constructed framework was discussed and analyzed, with key outcomes and implications as well as limitations and the next required steps being identified.

The research objectives were fulfilled to an extent, and research questions were, for the most part, answered. The key components of customer journey and marketing automation were identified and studied thoroughly, and their relations to one another were examined with a number of dependencies and outputs being identified. Based on these identified variables and their linkages, a preliminary framework was drafted which showcases the processes and connections in utilizing the customer journey concept in marketing automation. However, due to the nature of the used research methodologies, lack of

research in some areas of theory as well as the absence of a market test these connecting links cannot be definitively presented. The knowledge gap between the customer journey and marketing automation has been narrowed, but not fully closed.

The next steps for studying the customer journey and marketing automation are to test the framework with real-life cases and validate its performance. Based on results the framework should be modified, developed further or deemed valid. Such a market test is already being preliminarily planned to take place with Biit, the company with which this paper has been carried out in cooperation with. Furthermore, additional theoretical concepts should be investigated to see if they add context to the topic and the framework. Covering the research gaps identified during this research, especially in the marketing automation theory should be addressed in order to build a holistic marketing automation theory that acts as a solid foundation for this and other studies on the topic.

The theoretical implications of this study culminate mostly around the proposed framework for utilizing the customer journey into marketing automation. In addition, identifying and bridging the knowledge gap between the customer journey and marketing automation theoretical concepts can be considered a notable theoretical implication of this study. This gap and lack of theoretical connection has been highlighted as a challenge by companies which deal with topics related to these two approaches as a part of their business. Finally, this study echoes the observations of previous researchers for the development of a holistic marketing automation theory and its subsequent parts in order to be able to successfully apply it into practice as well as utilize it in other areas of research.

Managerial implications from the results of this research are less prominent, though some can be identified. The proposed framework of this paper provides implications for how companies should aim to utilize, link and exploit the benefits of customer journey approach in delivering superior customer experience through their marketing automation operations. Identifying, examining and explaining the process phases included in incorporating the customer journey concept into marketing automation solution delivery can be seen as a significant result, which should be taken into consideration by companies aiming to improve the customer experience of their marketing automation activities. Although even a weak market test for the conceived framework presented in this paper was not carried

out, it is preliminarily being planned to be carried out by Biit. The will of a company to explore this topic, apply the resulting framework into practice, develop it and make use of it is in itself a strong indication of the relevance of this study and its results. Finally, although not the intent of this research, the identification of tools, concepts and practices such as the lead scoring matrix as a part of this paper have been seen as interesting additions by parties following the progress and results of this thesis.

Going forward, testing the feasibility of the proposed framework will be of significant importance. It is likely that testing and validating the framework with real-life markets will produce additional insights and information that will help develop the thesis further and create a deeper understanding of the specific linkages between the different customer journey and marketing automation concept components. A challenge for successfully reaping the benefits of the customer journey in defining marketing automation configurations may prove to be the broad scope of output the customer journey mapping and analysis produce: naturally not all of the outcomes from the customer journey process phases are related to marketing automation as customer journey mapping views all of a select company's service operations, not just the ones related to marketing. It will likely be beneficial to be prepared to utilize the outcomes of the customer journey mapping and analysis processes in other business areas and operations of the studied company in order to not waste valuable information. Another challenge may be to get companies to take the entire customer journey mapping and analysis processes seriously, starting from creating meaningful and relevant personas that utilized identified patters, instead of taking shortcuts which may compromise the relevance and accuracy of the obtained results.

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