Marketing Automation Risk Assessment: A Systematic Review

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Abstract

Marketing Automation (MA) represents the sea of change of accountability and measurement that marketing departments have needed for decades. Marketing executives are deploying new approaches to amplify product and service messages. While no medium is categorically ignored, this study analyzes how MA tools are being put into place without a clear definition of the goals and objectives. More importantly, this research provides a framework and conceptual model to enhance organizational marketing automation risk assessment. To capture the various risks associated with automating marketing tasks, eight discrete categories have been identified measuring the maturity and infrastructure within marketing departments. This study utilized surveys developed by practitioners and distributed to major organizations and their employees. Using this data, an algorithm was developed using a single perspective for all questionnaires and a sliding scale of value to overweight the more important risk categories and to reduce the impact of less risk categories. To date, there has been very little to no conceptual research on marketing automation risk assessment.

Literature Review (In Brief)

Anecdotal evidence suggests that executives possess an irrational belief that a technical solution will fix decades of lax processes and procedures while enabling aspirational capabilities never fathomed by the marketing staff. The few academic studies available opine that the use of MA is an emerging trend yet definitions vary based on usage and industry. Swieczak (2013) expressed in simple terms that marketing automation is a technology that allows companies to streamline marketing processes, better organize marketing tasks, fully automate marketing strategies and precisely measure their effectiveness. If done correctly, this should lead to increased return on marketing investment and automate repetitive marketing tasks (Jarvinen & Taiminen, 2016; Swieczak, 2013).

Todor (2016) posited that the key to efficient automated processes is also the usage of business intelligence and that automation solutions transcend the customer lifecycle by working behind the scenes to improve customer experience. Research has uncovered that a significant subset of companies attempting MA are missing a critical review step when planning projects to implement tools on remote (non-premise) platforms. Holloway, Dietz, and Hansen (2013) stipulated organizational usage will indirectly and positively affect salesperson performance based on a combination of cognitive (i.e., marketing information processing) and attitudinal (i.e., customer orientation) mediating variables that allow for higher quality customer relationships. This assessment step is necessary as many of the risks impacting delivery and achieving the objectives are dispersed across a wide area within sales and marketing not only focused on capabilities of the staff but also the infrastructure necessary in transporting data onto a third-party platform.

It should be remembered however, that automation cannot and never will take the place of intelligence, good layout, well-trained personnel, effective advertising, carefully planned promotions, sound policies, and satisfying customers' needs (Goeldner, 1962; Swieczak, 2013). Gembarski & Lachmayer (2016) indicated that automation should be a force working in conjunction with these factors, to move the goods from the producer to the consumer in the most efficient manner. Marketing automation helps point the right way, locates the slow items, and shows up the fast movers (Head, 1960; Jarvinen & Taiminen, 2016)

In order to explore the defined solution space rapidly and efficiently as well as to ensure a high level of innovativeness, the utilization of existing design knowledge and the automation of routine design tasks are critical success factors. So, the organizational efforts for creating product variety are minimized (Todor, 2016). This research uncovers and provides a framework for critical categories in assessing and enhancing marketing automation opportunities for organizational strategies and decision-making processes.

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Keywords: *Marketing Automation, Digital Marketing, Risk Assessment, Corporate Culture, Client Experience, Sales*

Relevance to Marketing Educators, Researchers and Practitioners: This research would have immediate impact for marketing practitioners to help calculate ROI, predictive sales paths, and determining factors for automation success.

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TRACK: Marketing Strategy