

Lessons from a Marketing Automation Certification Experience

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Marketing automation is expected to become a \$25B industry by 2023 (Sweeney 2018). Academic researchers have also acknowledged the importance of automation and have given increasing attention to it (Järvinen & Taiminen.2016). As the basis of the current research, the author received hands-on training and successfully got certified in the use of a leading automation platform used widely across Fortune 50 companies.

The paper is comprised of reflections on the interplay between theory and practice in contemporary marketing with a focus on the use of marketing automation (MA) and customer-relationship management (CRM) software. The research also reflects on the successful certification process as a means to assist academic colleagues with introducing automation and related digital tools in the classroom.

The training took place in a marketing agency that partners with one of the leading automation platforms. The agency coaches the platform's clients on how to use the automation software to its maximum potential within the context of the clients' individual organizational needs and resources. As such, the author observed the interplay between sales and marketing with clients across several industries and in both B2B and B2C categories.

Unsurprisingly, the fundamental observations mirror the established knowledge in sales literature. Whereas the marketing-sales disconnect continues to influence research agendas, it is also the most talked about issue in marketing practice among organizations that use automation. This suggests that automation in and of itself is not a panacea for a problem that has pained marketing and sales organizations for decades.

Among MA users, the said disconnect is between what is considered as a lead as qualified by sales versus a lead generated by marketing. The use of MA synchronized with CRM tools has the potential to narrow the rift between marketing and sales' qualification criteria. An elimination of the rift altogether depends on reconsidering incentive structures for sales and marketing.

Lead generation, acquisition, nurture, and ongoing relationship management are substantially more efficient with automation. The digitization of content creation, segmentation, targeting and delivery, as well as the automated electronic management of resulting customer actions across buying stages allows marketing and sales to improve focused communication efforts and readily adapt selling strategy for substantially more efficient and effective campaign and relationship management.

MA platforms provide an overwhelming number of content customization and task automation options. From managing tradeshow and webinar registration through seamless integration with third-party event platforms, to tracking the use of gated content in multi-stage nurture programs, the volume of data created by buyer interaction with marketing and sales assets is

manageable only with the use of digital storage and retrieval technologies. The resulting data and customizable analytics are available to any internal stakeholder in marketing and sales.

Lastly, the learning curve in the study of MA and CRM software is steep. As educators, it is incumbent upon marketing and sales academics to begin introducing automation and CRM concepts in the classroom to a generation of students that is more likely than not to utilize these technologies in the workplace.

Järvinen, J., & Taiminen, H. (2016). Harnessing marketing automation for B2B content marketing. *Industrial Marketing Management*, 54, 164–175.
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Sweeney, E. (2018). Forrester: Marketing automation spend will reach \$25B by 2023. Retrieved from <https://www.marketingdive.com/news/forrester-marketing-automation-spend-will-reach-25b-by-2023/522900/>