ORGANIZATIONAL IMPLICATIONS OF SHIFTING TOWARDS A RESULT DRIVEN MARKETING STRATEGY: IMPLEMENTING A 'LEAD TO REVENUE MANAGEMENT SYSTEM' IN AN IT COMPANY

THESIS SUBMITTED IN ACCORDANCE WITH THE REQUIREMENTS OF THE UNIVERSITY OF LIVERPOOL FOR THE DEGREE OF DOCTOR OF BUSINESS ADMINISTRATION

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ABSTRACT

The goal of the research presented in this thesis was to identify necessary changes to facilitate the implementation of Lead to Revenue Management (L2RM), from a process, people, systems and organization perspective, in the researched organization, a multinational software company in the business to business (B2B) market. The thesis identifies success factors for implementation of L2RM in the organization by revealing problem areas and finding approaches to addressing the revealed problems. The research questions are “What are the success factors in terms of processes, people, systems and organization for implementing L2RM in the organization?” and “How can these factors be managed for successful implementation of a L2RM framework in the organization?” In order to find answers to the research questions, action research methodology was applied, with semi-structured interviews, learning set meetings and a research journal as data collection methods. Using a conceptual framework consisting of four building blocks, processes, people, systems and organization, this research identified several issues within each building block and found approaches to resolve them.

A large array of success factors involved in the implementation of L2RM can be grouped into the four building blocks. In order to manage these success factors, the following action items were identified through the research: creating an end to end process map; informing stakeholders about L2RM; executing new L2RM processes; implementing marketing automation tool; providing open communication for all stakeholders; applying a participative selection process for marketing automation tools; training the employees about analytical and inbound marketing skills; hosting marketing and sales alignment meetings; creating KPIs overarching marketing and sales departments; and implementing a result driven mindset. The thesis reports on how these factors were identified, what actions were taken to address them, how the organization has responded to the study, and the implications for the organization and the researcher.

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LIST OF ABBREVIATIONS

B2B	**BUSINESS TO BUSINESS**
IT	**INFORMATION TECHNOLOGY**
KPI	**KEY PERFORMANCE INDICATOR**
L2RM	**LEAD TO REVENUE MANAGEMENT**
ROI	**RETURN ON INVESTMENT**

CHAPTER 1 - INTRODUCTION

In this research, as an insider researcher I have investigated the implications of shifting towards a result driven marketing strategy, in order to create a direct line of sight from marketing campaigns to revenue generation in my organization, a multinational software company in the Business to Business (B2B) market. This introductory chapter describes the context for this research by presenting the relevant knowledge about the state of the organization prior to this study and reviews the key literature informing this research. Subsequently, the problem is laid out and the purpose of this research is presented. Next, the research questions of this thesis are developed and the significance of this research to practitioners, the researcher and the researched organization is offered. Finally, the scope of the research is defined and the structure of the entire thesis is presented.

1.1 Research Context

The researched organization is a multinational Information Technology (IT) company, that produces software solutions for businesses. The company consists of seven core departments: marketing; sales; products and services; research and development; infrastructure; finance and human resources. While focusing on the European market in early years, the company has expanded its customer base, having a strong foothold in North America. The client base spans across different industries, ranging from manufacturers to service providers and educational institutions. Historically, the organization has focused on delivering outstanding products and services, but has neglected developing modern marketing strategies. My role as the Head of Global Demand Generation within the company encompasses the demand generation strategy and its execution by digital marketing and inside sales teams. The main responsibilities of my teams entail demand generation, campaign management and inbound marketing.

The role of marketing in my organization has been changing rapidly over recent years as a result of the digital revolution. With the increase of digitalization in the market, the impact of the digital revolution on B2B marketing has been widely discussed and a variety of solutions for the challenges the new era brought have been investigated in the literature (Leeflang et al., 2014). The increased empowerment of potential customers has led to a trend towards increased online channels for purchasing decisions before they come into direct contact with the organization (Woods, 2009). Thus, the role of the marketing function has become increasingly more important in overall organizational success. Moreover, the role of digital marketing and big data has become increasingly more important in marketing functions (Järvinen and Karjaluoto, 2015). The increasing complexity and responsibility of the marketing function in the organization triggered the need for change in the marketing department.

Prior to this research, the marketing department did not have sufficient tools, skills and processes to fully exploit the available data to engage in data driven marketing and measure the marketing success in terms of revenue. The lack of clarity on revenue contribution led to inefficiencies and the potential of continuing investment in unsuccessful campaigns. As Day and Malcolm (2012) argued, accurate measure of marketing success in terms of business value is critical for optimizing marketing efforts. Therefore, a revenue focused approach such as lead to revenue management (L2RM) was selected to be implemented, within the context of this research, with the aim of mitigating the inefficiencies, increasing the contribution of marketing efforts into the sales pipeline and improving the return on investment (ROI) of the organization's marketing efforts. L2RM is defined by Wizdo et al. (2014: 1) as a "set of integrated processes, goals, and metrics, that frame marketing practices from lead generation to sales close, and that calibrate marketing results to sales results". Furthermore, Wizdo et al. argue that with visibility from campaign level to customers, marketing departments are better able to evaluate their activities in terms of revenue generation. In other words, the marketing department gains the ability to show the extent of campaigns contributing to revenue (Day and Malcolm, 2012). Successfully implementing and operating a L2RM framework is expected to result ultimately in greater customer acquisition, current customer expansion and overall revenue growth, facilitated by knowledge of the relationship between marketing costs and revenue (Wizdo, 2015).

As Wizdo (2015) emphasized, adopting L2RM requires a significant cultural change and the redesign of marketing and sales processes, supported by marketing automation. The organization has to implement new processes that accommodate data driven decision-making, which can be facilitated by marketing automation tools. Additionally, there is a need for close collaboration and alignment between marketing and sales departments. Members from both teams have to engage into a cross-functional process. It becomes clear that L2RM is not a one-dimensional change effort, but a business transformation. This change does not only involve the marketing and sales departments, but encompasses a larger scale transformation for the whole organization and requires substantial change efforts in four building blocks: processes; people; systems; and organization (Verhoef, Kooge and Walk, 2016).

Leeflang et al. (2014) deliver a word of caution, stating that many organizations aren't ready yet to move past classical organizational structures and break down silo mentalities. They identify the sheer speed in technological advances as the reason for this inability to change. However, the increasing importance of digital marketing requires cross-functional alignment to develop a competitive advantage and makes the implementation of L2RM in the organization an important topic.

1.2 Problem Statement

In order to optimize marketing efforts and mitigate inefficiencies, the marketing budget should be allocated into marketing activities based on the data about the effectiveness of each marketing activity in terms of revenue contribution (Järvinen and Karjaluoto, 2015). In other words, if marketing teams know which campaign contributes most to company revenue, budget can be allocated to the most profitable marketing activities with ease. However, this requires a clear visibility into the lead to revenue process, which was not available in the organization prior to this research. On the contrary, most decisions were taken based on gut feeling because of the lack of actual data capabilities. By taking decisions in this way about which marketing channels and campaigns to invest into, marketing teams were not able to improve their performance and increase their contribution to the company's revenue. Eliminating this inefficient usage of marketing resources may develop a competitive advantage.

Implementing a revenue focused marketing strategy such as the L2RM framework is expected to provide visibility into the sales funnel and visibility from marketing campaign level to revenue generated (Wizdo, 2015). In order to achieve this visibility, marketing and sales departments need to adopt a collaborative workstyle and develop the capabilities to address potential customers in the most efficient way throughout their customer journey. However, this requires a substantial organizational change that goes beyond the marketing and sales departments (Verhoef, Kooge and Walk, 2016). Optimizing marketing performance by identifying the contribution of marketing activities to revenue is crucial for the continued competitiveness of the organization and posed a major challenge. Implementing a L2RM framework in my organization was a step towards achieving cross-functional alignment and a change in mentality towards data driven decision-making. Identifying success factors for implementation of a L2RM framework by uncovering organizational issues that present obstacles, understanding their organizational implications and ensuring the success of the change process in the organization are key components of this research.

1.3 Purpose of the Research

The goal of this research is to identify the necessary changes within the organization to facilitate the implementation of L2RM from a process, people, systems and organization perspective. The purpose of this thesis is to identify key factors for the successful implementation of L2RM in the organization, by revealing problem areas within the company as well as finding approaches to address the revealed problems. The action items identified and agreed upon to address the organizational problems reflected the organizational reality and enabled the organization to implement the L2RM framework. The motivation for this research was based on an actual problem the organization has been facing, which was the lack of clear visibility into the lead to revenue process and the lack of data driven decision-making in marketing department. Accordingly, my research followed the process of working on this problem towards a measurable and results focused marketing strategy with a line of sight from campaign level to company revenue, in order to improve the return on marketing investments. With such information available, the marketing department could identify the most profitable marketing activities and optimize budget allocations. By implementing a L2RM framework, my aim was to enable the marketing department to develop clear visibility between marketing activities and company performance in terms of revenue. Furthermore, by conducting research from the inside, I further aimed to generate actionable knowledge which is relevant to the organization and rigorous to the scholarly world. Findings from this research may guide other organizations facing a similar problem and provide input to future research in this field. Although this research did not aim to generate knowledge that is generalizable in nature, parallels could be drawn to inform future scholarly or practitioner research in this subject area.

1.4 The Research Question

According to Whetten (1989), there are six types of explicit questions to develop the research questions; who, what, where, when, how and why. For this thesis, I focused on the 'What?' and 'How?' questions, which aim to investigate the factors that are part of the phenomenon studied and how these factors influence the outcomes. Considering the background of the subject area and the organization, two key questions emerged to guide this research and serve the main goals. In this research, I investigated what factors influence the successful implementation of L2RM in the organization and how can they be managed in order to improve the outcomes of the implementation. The first research question underlying to this study is "What are the success factors in terms of processes, people, systems and organization for implementing L2RM in the organization?". The second research question is "How can these factors be managed for successful implementation of a L2RM framework in the organization?".

1.5 Significance of the Research

With this research, my intention was to create new actionable knowledge that is both rigorous and meaningful to practitioners. The actionable knowledge created as a result of this study is intended to ultimately benefit the organization by guiding successful implementation of L2RM. The organization was expected to benefit from the outcomes of this research, as the evidence in the literature suggested that the successful implementation of L2RM is likely to improve efficiency and have a positive influence on the bottom line of the organization. Developing a competitive advantage through L2RM was expected to enable the organization to outperform its competition and ensure its long-term success. Moreover, the collaborative approach of conducting action research involving the members of the organization was intended to foster organizational learning. Future change initiatives in the organization may follow a similar approach or borrow key elements from it. Additionally, the participants in the research had the opportunity to engage in individual learning by developing new skills and reflecting on their actions.

Moreover, the actionable knowledge created through this research may guide other B2B organizations in successfully implementing a result driven marketing strategy, although the results may not be generalizable to other organizations due to the scope of this research. Additionally, the results from this research could deepen the body of knowledge on the implementation of value based marketing strategies. For me as the researcher, this thesis project uncovered key success factors not only for implementing L2RM, but for implementing strategic change initiatives and increase the success of future change initiatives in the organization. The reflections involved in this research also helped to promote self-learning for me as the researcher, both from a scholarly and from a practitioner perspective.

1.6 Scope of the Research

The focus of this thesis is the implementation of L2RM in my organization, a multinational B2B software company. The decision to implement L2RM in the organization was already taken through multiple steps via a collaborative approach prior to the start of this research. Hence, the decision to implement L2RM was not been part of this research and was out of its scope.

The goal of the research is therefore to identify the necessary changes within the organization to facilitate the implementation of L2RM, specifically from a process, people, systems and organization perspective. This research has been conducted within one organization in the IT industry. Accordingly the findings of this research may not be generalizable due to its specific organizational setting, including the organizational culture and other factors specific to this company.

Due to long sales cycles in the B2B software industry, averaging at around twelve months, it was not possible for me to focus on the influence of L2RM on company performance from a quantitative perspective. Moreover, the long sales cycles and relatively small number of large sum deals made the collection of numerical data to measure the impact on revenue unfeasible and thus out of the scope of this research. Furthermore, this research does not make any predictions about the magnitude of impact on the bottom line that can be expected by implementing L2RM in the organization.

1.7 Structure of the Thesis

Following this introductory chapter, Chapter 2 presents key concepts relevant to this research, by critically reviewing the existing literature in two lines of research. The first line of research examined in the literature review discusses the paradigm shift occurring in B2B marketing as a result of the digital revolution. Potential customers increasingly collect information through digital channels, prior to any direct engagement with sales teams, which has a significant influence on the buying decision. As a result, the responsibility of marketing is increasing and moving down the sales funnel (Mintz and Currim, 2013). This increase in accountability should be aided by abandoning 'silo mentality' structure by function and moving to cross-functional collaboration and aligning goals across departmental lines (Leeflang et al., 2014). In addition to new approaches to work, marketing teams are urged to leverage the increasing amount of customer behaviour data available in order to develop data driven marketing strategies and decision-making practices (Snijders, Matzat and Reips, 2012). The increasing usage of data in marketing decisions may result in improved higher contribution of marketing activities in business value and revenue (Järvinen and Karjaluoto, 2015). The second line of research reviews the connection between marketing performance and organizational performance, debates the B2B marketing performance measures and inspects marketing strategies focusing on value creation. Marketing's increasing accountability in company revenue triggers the need for suitable performance metrics with a financial focus (Mintz and Currim, 2013). Frameworks such as L2RM which focus on financial results allow marketing teams to optimize campaigns and marketing channels in order to increase the revenue generated through marketing investments (Järvinen and Karjaluoto, 2015). Based on the examined lines of research, I then discuss the building blocks of change needed for implementing L2RM. Wizdo (2015) argued that marketing professionals should not underestimate the business transformation required to implement L2RM in the organization. To facilitate the implementation of L2RM in the organization, four building blocks of change stand out as keys to implementing data driven marketing strategies: processes; people; systems; and organization (Verhoef, Kooge and Walk, 2016). Based on the examined subject areas, the literature review introduces the conceptual framework which laid the groundwork for this research.

Chapter 3 describes the methodological approach undertaken in this research. The chapter opens with a description of the organization prior to the decision to undertake the research and depicts the factors triggering the change process. Pragmatism, which sees reality as unstable and constantly changing (Teddlie and Tashakkori, 2003) is identified as the research paradigm. The pragmatist puts the research question itself into the centre, which guides epistemology and ontology. Identifying the philosophical underpinnings of this research also informed the choice of action research as a research method. Action learning cycles ensure that the research puts sufficient emphasis on reflecting on the undertaken actions (Coghlan and Brannick, 2010). Chapter 3 also explains the participant selection criteria, addresses insider researcher role duality and provides an overview of the data collection methods used. The data needed for this research was qualitative in nature and guided the selection of specific data collection tools. Interviews and learning sets were used as main data gathering tools. Keeping a research journal was also employed to increase the degree of reflection and trace how my understanding of the research changed over time. Lastly, this chapter covers the data analysis approach.

Chapter 4 presents the results and is composed of two main parts. The first part reviews the findings from the interview stage. The goal of this stage was to understand the perception of interview participants about problems the organization was facing in each building block in the framework used to examine keys to the success of the L2RM implementation. Twenty issues emerged. They were grouped into eight categories which were then mapped to the four building blocks and formed the basis for the learning set meetings. The second main part of this chapter presents the findings from the learning set stage. The learning set followed five action learning cycles and aimed at identifying action items for each of the issues identified from the interviews. The very first action learning cycle served as introduction and as the planning stage for the latter cycles. Except the initial cycle, one action learning cycle was dedicated to each building block. The action learning cycles resulted in several action items addressing the identified organizational issues as well as recommendations to the organization. As a part of the action learning cycles, the actions agreed upon by the learning set were undertaken and reflected on during the next learning set meeting. This approach enabled the learning set to find solutions that are relevant to the organization and to engage in learning by reflecting on the actions taken.

Chapter 5 discusses the results of the research and offers answers to the research questions. The discussion chapter is divided into two main parts where both research questions are answered from the perspective of each building block and the findings from the research are compared to the body of knowledge. The findings from the interviews enabled me to identify success factors for the implementation of L2RM relevant to the researched organisation and provided evidence for answering the first research question. The sessions with the learning sets provided the stage to identify suitable action items to manage the success factors to implement L2RM and provided evidence for the second research question. Besides using the data collected from the interviews and learning set meetings, the discussion chapter also used data from the research journal, which I maintained through the entire research process, and in which I recorded observations and reflections from the action learning cycles.

Chapter 6 concludes this thesis by summarising the findings and discussions. This last chapter also reviews my development as a scholar practitioner, as well as the organisational learning that occurred in the company. Lastly, the conclusion chapter discusses the limitations of this research, as well as outlining recommendations for future research.

CHAPTER 2 - LITERATURE REVIEW

This literature review examines two major subject areas from both a scholarly and a practitioner perspective to construct the conceptual framework for this research. L2RM is a concept evolved from the practitioner research that aims to integrate processes, goals and metrics to frame marketing practices from lead to revenue and to provide visibility on the revenue impact of marketing activities. I identified two lines of relevant literature. The first line of literature, paradigm shift in B2B marketing, discusses the major challenges to marketing departments of B2B companies triggered by the digital era and the increasing scope of marketing teams with the growing role of data in B2B marketing. The second line focuses on the relationship between marketing performance and organizational performance, discusses B2B marketing performance measures and examines the marketing strategies focusing on value creation. Based on the examined subject areas, I propose the conceptual framework that laid the groundwork for this research. The literature review is structured into three main sections:

First, the literature review provides an overview of the external factors that push marketing departments to transform into value adding stakeholders in the revenue generation process. The digital revolution has been driving changes in customer behaviours, resulting in customers seeking information without contacting potential vendors (Cummins, Peltier and Dixon, 2016). This change in customer behaviour has led to the need for marketing departments to expand their scope and draw in prospects without any direct interactions (Järvinen and Taiminen, 2016). To address this increase in the scope of marketing departments, the abundancy in big data offers great potential for data savvy marketing professionals (Leeflang et al., 2014).

Second, the literature review describes the need for revenue driven marketing and its inherent change in mentality (Day and Malcolm, 2012). Information about the effectiveness of marketing activities in terms of revenue generated is critical not only for optimization of marketing campaigns, but also important for increasing the stakes of marketing departments in business success (Järvinen and Karjaluoto, 2015).

Finally, the conceptual framework of this research is developed. Based on the dimensions of change for implementing data driven marketing strategies described by Verhoef, Kooge and Walk (2016), I present a conceptual framework consisting of four building blocks for change: processes, people, systems and organization. Each building block focuses on an aspect of change for the organization: processes refers to sets of defined sequence of steps; people addresses the changes of skills and mindset needed; systems describes the necessary technological aspects to consider; and organization refers to changes aiming to improve collaboration between departments and adopt a result driven culture.

2.1 Paradigm Shift in B2B Marketing

B2B marketing research has its roots in the end of 1800's. However, the theoretical frameworks in the literature have been through several fundamental changes over time. B2B marketing theory developed from an economic foundation, to behavioural sciences and, in recent years, to a data driven science with a major emphasis on digital B2B marketing (Hadjikhani and LaPlaca, 2013). The evolution of B2B marketing research has resulted from changes in the practice of B2B marketing field, due to a paradigm shift towards digital marketing channels. The 1990's marked the beginning of e-commerce and the 2000's brought the dawn of the social commerce era (Fader and Winer, 2012). These rapid changes in the market imposed a variety of challenges the B2B companies and their marketing departments (Hadjikhani and LaPlaca, 2013). With the increase of digitalization, scholars and practitioners have focused on discussing the impact the digital revolution has on B2B marketing and proposed solutions for the challenges the new era has brought (Leeflang et al., 2014). It is visible from the history that B2B marketing has developed at a steady pace since its inception (Hadjikhani and LaPlaca, 2013), but has undergone rapid changes within the past few decades. Since the changes continue with an increasing speed, Leeflang et al. (2014) argue that marketing departments must be ready to adapt to the changing customer requirements to keep up with their competitors.

This section of the literature review presents the changes and challenges the digital era has brought to the marketing departments of B2B companies, outlines the expanding scope of the marketing function, examines the growing role of data in B2B marketing and draws parallels between the literature and the researched organization.

2.1.1 Digital Revolution in B2B Marketing

A number of studies have investigated the influence of the digital revolution on B2B marketing from a theoretical or a practical perspective. Several researchers have discussed the impact that digital marketing channels and increasing data exert on the business models of B2B companies (Day and Malcolm, 2012; Bolton et al., 2013; Kumar et al., 2013). However, research in digital marketing is still a young field and scholars are seeking more depth. Kumar et al. (2013) called for more research to connect traditional and new sources of customer data to performance metrics. Tirunillai and Tellis (2012) as well as Fader and Winer (2012) researched content marketing strategies and their influence on the business value. Feit et al. (2013) proposed a framework to understand and analyse the digital data in B2B marketing but specifically developed for media companies to monitor multiplatform media consumption and leverage their data by combining data from different sources. Feit et al. (2013) recommend that marketing teams develop information systems capabilities and encourage marketing professionals to start working with data, even though the data might not be in the most convenient format. However, Feit et al. (2013) did not address the effects of the speed of change brought about by the digital revolution on adopting data capabilities and therefore may have overlooked the underlying reasons that marketing teams do not adopt a data driven approach. From the practitioner side, a study conducted by IBM investigated the main challenges that B2B marketing leaders faced as a result of the digital revolution and concluded that data 'explosion', the rise of social media, and increasing complexity of marketing roles and responsibilities are the most important role marketing challenges today (IBM Institute for Business Value, 2016). Although, this study draws conclusions from interviews with a large sample of senior managers, there is little information provided about the methodology of the research and its scholarly rigour.

With the digital revolution, customers are now more empowered than ever before. While three decades ago, marketing was conducted with mail order catalogues, telemarketing or store displays, in today's world online channels are gaining a pivotal role (Woods, 2009).

This enables potential customers to have a proactive approach to making buying decisions as they can research products and services with great ease (Copulsky and Cutten, 2013). With the dawn of the digital era and the great advances in information technology (IT), the rules for how B2B companies conduct marketing have changed. There has been a shift in paradigms, spurred by new technologies and information sharing in the past decades (Woods, 2009; Andzulis, Panagopoulos and Rapp, 2012). It was traditionally the role of the salespeople to inform potential customers about new solutions to business problems. With today's IT possibilities, potential customers actively search for sources of information from digital channels such as websites, newsletters, relevant webinars or blogs (Woods, 2009). This allows customers to learn about potential solutions to their business problem without directly talking to a sales person. According to Adamson, Dixon and Toman (2012), B2B customers complete on average around 60% of the buying process before contacting the vendor. However, Adamson, Dixon and Toman (2012) do not provide information about the methodology of the findings and the reliability of their statement could not be validated. Potential customers gather most information through digital channels and a large part of the buying decision is made during this process before a potential customer talks to a sales person. The customer is benefiting from empowerment through IT (Pires, Stanton and Rita, 2006). The more empowering such a change in paradigm is for potential customers, the more complex the sales cycles get for B2B vendors (Adamson, Dixon and Toman, 2012).

The changing in the decision-making patterns of potential customers has redefined the marketing function in B2B companies. The marketing function is becoming an increasingly more important part of B2B buying cycles as marketing efforts lead engagement with potential customers through the new digital marketing channels (Greenberg, 2010). However, in the B2B environment, customers are not solely seeking a product, but also solutions to help them solve business problems. In order to address this need of their potential customers, B2B companies have begun to focus their marketing efforts on creating digital content that educates potential customers in solving business problems (Järvinen and Karjaluoto, 2015). However, Järvinen and Karjaluoto (2015) investigated only three industrial companies and their findings may not be generalizable. The change in B2B marketing approach towards 'inbound' marketing has, nonetheless, led to a rapidly-increasing amount of digital content, competing to receive the limited attention of potential customers. Dennis et al. (2009) and Greenberg (2010) described how the result of this abundancy in content can further shift B2B marketing towards targeted and personalized content, as the need for vendors to stand out in the crowd arose. However, Dennis et al. (2009) only offer a conceptual paper with new research directions while Greenberg (2010) does not distinguish between B2B and B2C markets, so research on this topic is ongoing. Järvinen and Taiminen (2016) observed that B2B marketing experts have started using targeting and personalization strategies in their marketing strategies in order to maximize the engagement with their prospects (Järvinen and Taiminen, 2016). However, they studied only a single case study, which may serve as a suitable starting point for in-depth investigation of new phenomena but may not be generalizable due to its highly specific setting.

In the past few years, another trend has further changed the buying behaviours of B2B customers. Potential customers no longer do their research on the Internet only through desktop computers, but increasingly through mobile devices and tablets. Moreover, they use a variety of channels including social media sites and online communities for assisting their buying decisions (Cummins, Peltier and Dixon, 2016). These new buying behaviours have led to the need for 'omni-channel' marketing, as vendors need to accommodate a wide range of buying options in order not to miss out on potential sales. As a result, the touchpoints for marketing with the potential customers have evolved, while the effective B2B marketing strategies have to consider the device and channel prospects are using (Hsiao, Yen and Li, 2012). This development highlights the important role of the marketing function to convey a seamless integration of messaging and offer a unified customer experience across a variety of channels (Cummins, Peltier and Dixon, 2016). However, the research in omni-channel marketing is still very limited, with Cummins, Peltier and Dixon (2016) being some of the early scholars to develop a framework for omni-channel marketing, in their case, by disseminating traditional sales functions across the marketing department.

As observed in both practitioner and scholarly research, the paradigm shift has had a visible influence on the researched organization as well. With the increased empowerment of potential customers, there is a trend among our customers towards increasing use of online channels for buying decisions. Today, the marketing department has to be equipped with the capabilities to effectively manage the interactions that occur in digital channels before the potential customers are directly in contact with the organization, as these indirect interactions are critical for the buying process (Adamson, Dixon and Toman, 2012). For this reason, the role of marketing has become increasingly more important in overall organizational success over recent years. Similar to the findings in the literature, the organization's marketing teams have to manage the touchpoints that can influence the initial stages of the buying process through various online and offline channels, before sales teams have the chance to interact and engage with the potential customers. In other words, until the potential customers are in contact with a salesperson for the first time, marketing activities are the only touchpoints between the potential customers and the company. The increasing complexity and responsibility of the marketing function in the organization has led to the need for change so that marketing will be able to keep up with its increasing responsibilities. The shift in customer behaviours provide marketing teams the opportunity as well as the obligation to expand the scope of their function (Mintz and Currim, 2013).

2.1.2 Expanding Marketing Scope

The paradigm shift in the digital era has forced B2B marketing functions to navigate in a far more complex environment than the traditional marketing practice (Järvinen and Karjaluoto, 2015). The growing role of marketing in sales cycles indicates that marketing teams need to go beyond their traditional scope, as marketing responsibilities move further down the sales funnel, nearer to customers (Mintz and Currim, 2013). However, this also indicates increasing accountability for the role played by marketing departments in company success (Day and Malcolm, 2012). Instead of focusing on and thinking only in terms of costs, modern marketing teams need to think in terms of revenue and business value. Traditional measures of marketing success are not capable of supporting new key performance indicators (KPI) for the marketing function with its changing and expanding goals and responsibilities. Historically, an accurate analysis of the relationship between marketing campaigns and company revenue was not available to B2B marketing departments (Mintz and Currim, 2013). Mintz and Currim (2013) promote the development of marketing metrics and linking marketing-mix activities to financial metrics. However, their proposals are based on self-reported performance from a single informant, which could inflate the apparent relationship between metrics and performance. Similarly, marketing leaders could, in the past, report the costs for their activities but not the value that was generated from each campaign, due to lack of appropriate technology and tools. As a result, marketing has been seen as a cost centre (Lamberti and Noci, 2010) and in times of economic crisis or recession, budget cuts often started on the marketing side as marketing could not prove its value (Kotler and Casilone, 2009). Contrary to expectations, scholars have found that in times of economic crisis or recession, maintaining or increasing budget on promotional activities results in an increase in sales and market share, but the inability of a marketing department to prove its contribution to the value often led to an unwarranted dismissal of the marketing activities (Srinivasan, Rangaswamy and Gary, 2005). With the increased ability of marketing departments to present their performance in terms of revenue contribution, the perception about marketing activities can shift from being a pure cost centre to contributor to revenue growth (Wizdo, 2015).

Today, B2B marketing teams cannot deny their accountability for company success and marketing departments have to be able to measure their performance accurately and show the return on their investments. Marketing leaders have been urged to understand and embrace this development, as well as implementing a culture within their departments to focus on value creation through performance (Day and Malcolm, 2012). In practitioner research, measuring B2B marketing efforts in terms of revenue performance has become a more prevalent concept in recent years with analyst firms such as Forrester Research heavily focusing on this area. Although implementing and adopting revenue related measures requires a significant cultural change and a redesign of the marketing and sales processes supported by marketing automation and data, Wizdo (2015) claimed that companies that implement these changes experience significant benefits by enabling the marketing department to identify the impact of marketing activities on revenue and eliminating non-revenue contributing efforts, thus increasing marketing's contribution in sales pipeline. However, Wizdo (2015) did not consider if the increase in pipeline contribution can solely be allocated to the revenue focus alone or if other factors also contribute to these improvements. There is a need for further research in order to identify all underlying factors such as different processes, skill levels of employees and technologies available to the marketing teams.

Improving organizational performance through measurable marketing strategies is also discussed in the scholarly research. To emphasize the accountability of marketing departments in company success, scholars have developed and repeatedly highlighted the usage of marketing metrics, which relate the marketing activities with financial outcomes (Mintz and Currim, 2013). Day and Malcolm (2012) stated that accurate measurement of marketing success in terms of business value is critical for optimizing marketing efforts to increase the marketing contribution to the organizational success. Homburg, Artz and Wieseke (2012) concluded that the ability to measure marketing performance provides the opportunity to improve organizational performance and to develop marketing performance measures that are more relevant to company performance because they are aligned with the overall organizational strategy.

Parallel to the literature, the role of marketing to the success of the overall business has been rapidly increasing in the researched organization. The responsibility of the marketing department has been shifting down the sales funnel with a larger portion of customers' buying decisions being made through marketing channels. However, the processes, tools and culture to measure marketing success in terms of revenue were underdeveloped prior to this research. As a result, the marketing department was not able to identify the contribution of marketing campaigns to company revenue. This lack of clarity on revenue contribution has led to inefficiencies and repeat investments in unsuccessful campaigns. As evident from the literature, adopting a revenue focused approach may increase the contribution of marketing efforts into the sales pipeline and improve the ROI of marketing investments (Homburg, Artz and Wieseke, 2012). However, this change requires considering multiple aspects of the organization. Moving towards a revenue focused mindset requires the development of data analytics skills, especially in the marketing department. While traditionally gut feeling decisions used to be common in the organization, in a revenue driven company, the usage of data for decision-making is essential (Leeflang et al., 2014).

2.1.3 Big Data and Data Driven Marketing

With the digital era, the data available to B2B marketing teams increased vastly and, with new analytics tools at the disposal of marketing teams, strategic marketing decisions can be based on the data rather than gut feeling (Leeflang et al., 2014). 'Big data' can be used to describe very large data sets that can be analysed by advanced tools to reveal patterns, behaviours and trends (Madden, 2012). Several authors claim that big data makes it possible to measure the value generated through different marketing activities, optimize the use of marketing resources and maximize the ROI based on this information (Järvinen and Karjaluoto, 2015). In contrast, Grishikashvili, Dibb and Meadows (2014) describe the potential of big data as relative because the potential impact of digital technology may vary by industry. Companies offering virtual rather than physical products are likely to be more susceptible to the digital transformation.

Data driven marketing is not a strikingly new concept. Scholars have discussed and highlighted the potential of data driven marketing since the end of 1990's (Kutner and Cripps, 1996; Mulvenna, Norwood and Büchner, 1998; Schultz and Schultz, 1998). However, the amount of data available to marketers today is unsurpassed compared to any other point in the past. For B2B marketing teams, big data promises an immense amount of 'intelligence'. Part of the increase in available data can be attributed to the rise of social networks. Customers are displaying an increasing readiness to reveal personal information (Nunan and Di Domenico, 2013). The outcome is a growing amount of information available to B2B marketing teams. However, without analytical tools or skills the data delivers diminutive insights. For marketing teams to deal with big data, it is essential to develop analytical skills that enable them to gain deeper customer understanding. Understanding big data offers the great opportunity for marketers to follow customers through the customer journey. Tracking the customer journey efficiently allows marketers to optimize campaigns (Leeflang et al., 2014). In order to gain these insights, marketing teams have to be able to capture, store, search, transfer and analyse big data (Snijders, Matzat and Reips, 2012). As a result, the ability to perform technical analyses of the customer journey is becoming a pivotal role in B2B marketing (Leeflang et al., 2014).

If used and understood properly, big data can greatly help in optimizing campaigns based on personalized knowledge from potential customers (Järvinen and Karjaluoto, 2015). Researchers emphasize the potential of data driven marketing and argued that big data enables accurate measurement of customer response to marketing efforts, the marketing costs and increases the contribution of marketing to company revenue (Moussy et al., 1998; Davenport et al., 2001; Loveman, 2003). Despite the potential benefits, many organizations do not use data driven marketing because their marketing teams are not equipped with resources to make sense of big data (Jeffrey, 2010; Leeflang et al., 2014). However, it is a misconception to assume that marketing teams must have extremely sophisticated data analysing capabilities before engaging in data driven marketing. Jeffrey (2010) states that the Pareto principle applies; marketers need to focus on the 20% of the data that deliver 80% of the value.

With the increasing use of digital channels, the effects of data abundance have been evident in researched organization as well. Prior to this research, the marketing department did not have sufficient tools and processes to fully engage in data driven marketing and make use of the intelligence to be obtained from big data. As evident in the literature, increasing the use of data in marketing decisions may increase the contribution of marketing efforts to business value and revenue (Järvinen and Karjaluoto, 2015). In order to gain a revenue focused approach and adapt to the increasing scope of the marketing function in company success, I believed it was essential for the organization to shift towards a data driven marketing approach.

2.2 Revenue Driven Marketing Strategies

The growing accountability of the marketing function as a contributor to B2B business success dictates the need for accurate performance measures that are capable of identifying the return on marketing investments. It is important for marketing leaders to understand how value is created through marketing activities and to have a clear line of sight from the campaign level through to company revenue (Day and Malcolm, 2012). Marketing leaders need to know which marketing campaigns contributed to revenue generation to be able to optimize the effectiveness of their marketing efforts and maximize their contribution to overall company revenue. In order to improve performance, marketing leaders need to put emphasis on defining and understanding their sales funnel, automate marketing efforts, identify their KPIs and adopt a revenue focused approach to measure their success.

This section of the literature review gives an overview of the sales funnel, discusses B2B marketing performance measures, examines marketing strategies focusing on value creation, introduces the L2RM framework and notes the related aspects to the researched organization.

2.2.1 Role of the Sales Funnel

The sales funnel is used to identify and position potential customers on a sequentially narrowing funnel, starting from all potential customers who may have interest and ending at customers that already made a purchase (Ang and Buttle, 2006; Patterson, 2007). The goal is to identify which stage each potential customer is currently in and target them with relevant information. Despite wide recognition and usage of the sales funnel in practitioner and scholarly literature, there is no unified form of it with a single description of number of stages, as the stages and their sequence are different from study to study (Patterson, 2007; Spiller, Tuten and Carpenter, 2011; D'Haen, Van den Poel and Thorleuchter, 2013). The sales funnel described by D'Haen and van den Poel (2013) consists of stages with increasing likelihood of buying and converting into a customer. Järvinen and Taiminen (2016) expand the sales funnel and create a loop by adding existing customers as new potential customers who would be targets for upselling and cross selling. The sales funnel used in this research is adapted from D'Haen and van den Poel (2013) and Järvinen and Taiminen (2016), and consists of four stages: leads, prospects, opportunities and deals, as shown in Figure 1.

Figure 1: Sales Funnel Framework (D'Haen, Van den Poel and Thorleuchter, 2013)

The first stage of the sales funnel is composed of leads and entails all potential customers that the vendor is aware of. This stage was traditionally limited to the company's resources to search and reach out to potential customers or to acquire information about leads through commercial sellers providing cold call lists or mailing lists (Wilson, 2006). However, customer acquisition through these types of lists has limited success (Covell, Mirabella and Babb, 2012). Furthermore, adding too many new leads to this stage may reduce efficiency, as the tasks needed to identify if the leads meet the company's customer profile criteria increase in complexity (Järvinen and Taiminen, 2016). With the aid of digital marketing, vendors can greatly improve the quality of their leads by offering relevant and targeted content across different digital channels to attract potential customers to the company website (Holliman and Rowley, 2014). As B2B customers increasingly seek information on the Internet in the early buying process phases (Wiersema, 2013), this is an opportunity not to be neglected. A common trigger for potential customers to share their personal information is to allow access to the content of interest, such as case studies, white papers, newsletters etc., by signing up through a form (Järvinen and Taiminen, 2016). The key aspect of this kind of acquisition is that customers seeking specific content are more likely to have a genuine interest in the company's products or services and hence more likely to be a prospect, compared to leads acquired by other means.

The second stage in the sales funnel consists of prospects and the aim of this stage is to increase the engagement through marketing channels and evaluate if a prospect meets the customer profile criteria (Long, Tellefsen and Lichtenthal, 2007). This is a very challenging stage and historically lead qualification has been conducted on the premises of intuition and guesswork (D'Haen and van den Poel, 2013), resulting in lower efficiency due to wasting resources and not focusing on profitable leads (Monat, 2011). According to Järvinen and Taiminen (2016), there are two main challenges in lead qualification; first, is the lack of common criteria for definition of a high-quality lead, which may differ significantly in each company; and second, is the lack of information about the specific characteristics of high quality leads. Even though the company might have identified the crucial information needed to qualify a lead, the information itself may only be obtainable when direct contact with the individual is established. In order to reduce the potential risk of losing efficiency through this conundrum, vendors can resort to information available to the public, but easily available information may not uncover the real level of interest (Long, Tellefsen and Lichtenthal, 2007). In this stage, marketing automation and content marketing can increase engagement and support the lead qualification process in B2B environments by offering more relevant content. This process, which is called 'lead nurturing', is the practice of building relationships by offering relevant content until the prospect can be transferred to the sales team (Spiller, Tuten and Carpenter, 2011). The duration of a nurturing campaign should coincide with the average customer buying cycle (Mathur and Trivedi, 2016).

The third stage in the sales funnel is the opportunity stage, in which the prospects are qualified enough to be contacted by the vendor, in particular by the sales team (D'Haen and van den Poel, 2013). In practice, scholars have shown that not all leads nurtured by marketing activities are contacted. The main reason for salespeople not contacting a lead is the conviction that the lead does not have enough sales potential (Oliva, 2006). Sabnis et al. (2013) reported findings of up to 70% of leads generated by marketing and handed over to the sales teams are never followed up upon, because the sales people do not trust the lead scoring process, which refers to the scoring of all leads based on various rules. To improve these inefficiencies, it is essential for marketing teams to implement an effective and transparent lead scoring process with the collaboration of sales teams.

The final stage in the sales funnel represents the opportunities that have decided to buy and are thus converted into customers (D'Haen and van den Poel, 2013). At this point, the customer is generating revenue to the vendor. In order to optimize the performance of the sales funnel and increase the number of leads that turn into deals, it takes the combined efforts of marketing teams and sales teams. Visibility of which leads are converted into customers in each campaign provides the basis to start measuring marketing activities in terms of revenue generation (Wizdo et al., 2014). Marketing automation also plays an important role in improving the efficiency of the sales funnel and understanding the customer journey (Spiller, Tuten and Carpenter, 2011). Companies that understand their customer journey and increase the customer engagement at every stage of the sales funnel are more likely to be able to optimize their marketing campaigns and increase their return on marketing investment (Wizdo, 2015).

As frequently emphasized in the literature, a clearly defined sales funnel is beneficial for optimal allocation of marketing resources (D'Haen and van den Poel, 2013). Although, prior to this research, the stages of sales funnel were roughly defined in the organization, the full potential of the sales funnel was not utilized. Although the initial stages of the sales funnel were considerably clearer, the transition from marketing to sales responsibility was not highly transparent and the stages after the prospects were handed over to the sales team had little visibility for the marketing team. This created a major obstacle in terms of understanding how value was generated through marketing efforts and hindered ability to measure the contribution of marketing efforts to revenue. As discussed in the literature, visibility throughout the sales funnel is a key contributor to increasing return on marketing investment and the revenue contribution of marketing (Wizdo, 2015). In order to achieve this in the organization, improved marketing performance metrics that measure the value contribution of marketing efforts were needed.

2.2.2 Marketing Performance Metrics

Accurate measurement of marketing success in terms of business value is critical for optimizing marketing efforts (Day and Malcolm, 2012). In order to measure marketing's performance, scholars have identified three main aspects of marketing performance and have developed metrics to measure associated KPIs. In the first line of research, researchers have focused on satisfaction, market share and awareness metrics (Lehmann, 2004; Farris et al., 2010). The second line of research connects the marketing performance metrics to the company's profit and the shareholder value (Abramson, Currim and Sarin, 2005; Schulze, Skiera and Wiesel, 2012). The third line of research has developed financial metrics such as net profit or ROI (Srinivasan and Hanssens , 2009). In order to increase the accountability of the marketing department for company success, scholars have developed and repeatedly highlighted the usage of marketing metrics, which relate the marketing activities with financial outcomes (Mintz and Currim, 2013). The need for more focus on the financial accountability of marketing activities has also been recognized in the practitioners' world (Wizdo et al., 2014). Despite the scholarly research linking marketing metrics to non-marketing metrics, Leeflang et al. (2014) found that there is a commonly held understanding among practitioners that marketing metrics can only be translated into financial terms with great difficulty.

The difficulty in determining the financial impact of marketing activities is rooted in measuring the results of specific marketing campaigns. Vendors can choose from a large array of online and offline channels in order to attract their potential customers, who in turn have the choice to engage with the vendor either online or offline (Leeflang et al., 2014). For marketers, it is particularly interesting to understand the degree of influence of specific marketing campaigns on the buying decision of their customers. A commonly used approach in order to identify such influences is the last click method. This method follows the assumption that the sale can be attributed to the last medium used by the customer (Leeflang et al., 2014). In industries with long customer journeys, it becomes obvious that such a simplistic way of linking marketing activities to converted sales may be very inaccurate. It remains unknown if the customer has used any other mediums prior to making the purchasing decision, let alone the number of possible mediums. The result of such a suboptimal method is an exaggerated success attribution to the very last step in the customer journey (Leeflang et al., 2014).

In practice, B2B companies increasingly put more effort into measuring the effects of their digital channels with financial metrics. Measuring the effects of search engine advertising, display advertising and social media advertising is receiving increasing attention (Manchanda et al., 2006; Rutz and Bucklin, 2011; Zenetti et al., 2014). An interesting approach to measuring the effectiveness of digital channels and traditional channels was proposed by Srinivasan, Vanhuele and Pauwels (2010). They offer a mindset metric, allowing companies to directly compare financial outcomes between traditional and digital marketing efforts. However, more research is needed in this area, as different marketing activities target potential customers in different phases of the sales funnel. Leeflang et al. (2014) state that mass advertising aims to create awareness and will therefore have an influence on the early stages of the customer journey and the top of the sales funnel compared to search engine advertising, which targets potential customers in later stages of the sales funnel.

In practitioner research, Forrester Research suggest the usage of ROI to measure the performance of marketing campaigns (Wizdo et al., 2016). Marketing leaders need to find the right balance between the five components that compose ROI: volume, velocity, value, efficiency and effectiveness. Figure 2 depicts these five components of ROI of marketing. Volume refers to the number of potential customers currently in each stage of the sales funnel. The vital knowledge about volume is to know the speed of growth of the pipeline and the number of potential customers added in each period. This allows marketers to understand which activities add the most potential customers to the sales funnel. Velocity refers to the time needed for potential customers to move through the stages of the sales funnel. Measuring the average duration for a customer to move through all the stages, can serve as the benchmark to analyse trends and identify improvements in the process, if potential customers are stalling in one stage for an above average amount of time. Value focuses on the importance of high value potential customers rather than on volume. Understanding which sources deliver the highest value customers into the sales funnel allows marketers to target that particular source. Additionally, understanding the value each source delivers into the sales funnel allows measurement of the value of the marketing efforts. Efficiency focuses on understanding the costs of customer acquisition. This is an important aspect when considering profitability optimization, as marketing departments need to understand the costs related to generating leads and converting them into deals. Effectiveness refers to metrics measuring the conversion rates of channels, which enables marketing leaders to identify which channels to invest into (Wizdo et al., 2016). This approach offers a comprehensive structure to measure the ROI. However, measuring these components may not be feasible for many organizations, depending on their unique setting or industry.

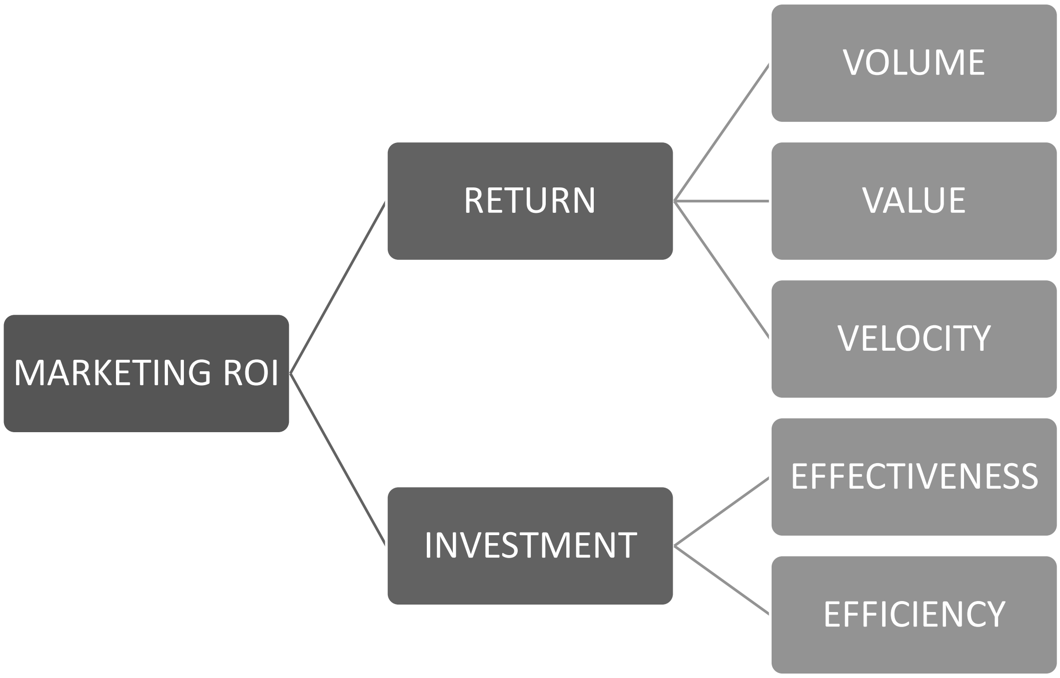

Figure 2: Components of Return on Marketing Investment (Wizdo et al., 2016)

In the researched organization, although there was a clear need to evaluate marketing success more accurately, the performance measures used prior to this research were not able to reflect the contribution of marketing campaigns to business value. As the sales funnel did not have sufficient visibility especially towards the bottom, revenue metrics were not being used. Thus, the existing marketing metrics only focused on the top stages of the sales funnel. As a result, marketing metrics were not result focused and failed to identify the actual contribution of marketing campaigns to business value. For this reason, the marketing department was not able to measure its ROI and invested its resources inefficiently. In order to optimize campaign performance, the change effort described in this thesis focused on the shift towards a revenue focused approach as recommended widely in the literature.

2.2.3 Lead to Revenue Management

The literature refers to several different aspects of marketing strategy associated with creating value to the organization. Habibi et al. (2015) describe the electronic marketing orientation concept as a model focusing on improving culture, structure and job designs for B2B marketers. However, their model was specifically designed for leveraging the benefits of social media marketing and might not be applicable to other marketing activities. Moreover, the approach described by Habibi et al. (2015) considers change aspects in processes, people and organization, but lacks a clear emphasis on systems. Leake, Vaccarello and Ginty (2012) discuss the effects of the increasing digital channel usage of prospective buyers on the sales funnel and emphasise new skills which they propose marketing professionals have to develop, such as knowledge about digital marketing and optimization of new metrics. They also discuss the potential of marketing automation and the integration of marketing tools within a company. On the other hand, Leake, Vaccarello and Ginty (2012) do not consider the effects of alignment between marketing and sales departments and more importantly they distinguish between marketing and sales funnels rather than considering a unified, single funnel starting from marketing and moving to sales touchpoints. Guan and Pooya (2013) propose a framework for improved customer targeting and lead generation, with the ultimate goal of implementing performance measures. They identify the challenges of increasing data available and the complexity arising from new buying behaviours. They recommend developing advanced targeting analytics and focus on the ROI. This approach has a strong focus on systems, elevating the technological and analytical aspects to being the deciding factors in success. However, Guan and Pooya (2013) do not dedicate enough attention to processes, people and organizational change as they focus solely on technology to increase visibility.

Research on revenue focused marketing strategies is scarce in the academic literature, as this is a fairly new concept that developed with the digital era. Moreover, the models discussed in the academic literature lack a holistic approach to implementation of a measurable marketing strategy. I therefore chose the L2RM framework from the practitioner literature for this research. L2RM is a prevalent framework that adopts a holistic concept to elevate marketing from cost centre to value creator. The term 'Lead to

Revenue Management' was coined by Forrester Research in 2010 and encompasses a "set of integrated processes, goals, and metrics, that frame marketing practices from lead generation to sales close, and that calibrate marketing results to sales results" (Wizdo et al., 2014: 1).

Conceptually, L2RM draws on inbound marketing, marketing automation and the sales funnel. An efficient L2RM system balances lead value, velocity and volume, thus creating the potential to drive revenue growth through customer attraction, capture, nurturing and retaining (Wizdo et al., 2016). According to Wizdo (2015), companies that have implemented a L2RM system have seen lower costs per lead and higher conversion rates, thus having a positive influence on the bottom line. However, the methodology of these findings is not provided, thus the validity and reliability of the research is not readily verified. Moreover, the L2RM concept was created by Wizdo herself and is being used as a consulting approach with Forrester Research clients, which could indicate a vested interest.

L2RM is more than just taking accountability of marketing activities in terms of revenue, or a pure automation of marketing practices; L2RM offers the opportunity for marketing teams to keep up with evolving customer needs and behaviours. Leading practitioners have expanded their lead to revenue scope to become the 'control tower' for customer engagement across the whole customer life cycle. In order to achieve this transformation, marketers have to work cross-functionally (Wizdo et al., 2014). It is important for today's marketing leaders to offer diverse information and options to customers, whose needs might be changing during their customer journey. Wizdo (2015) discusses six changes she proposes are necessary to achieve a customer centric approach. First, marketing teams need to focus on communicating the outcomes for the customer instead of focusing on product benefits. Showcasing product features does not approach the customers' needs, instead the goal is to communicate the right benefits to the right lead at the right time. Second, processes need to be designed and built to match the customer journey. The engagement points through the sales funnel have to meet the needs of potential customers, as they change with the stage of the customer journey they have reached at any given point. Mapping the customer journey in order to understand the stages potential customers move through can be of great help to understand it. Third, focusing on quality instead of quantity is key. The goal is to design a process that increases the probability of a lead converting to a customer through a series of interactions and repeating this process. Fourth, marketing teams need to contextually nurture their potential customers through a series of multistep nurturing programs to educate them. As a result, customer potential will be more mature when potential customers are handed over to sales teams. Fifth, is to change perspective on the customer journey; the L2RM process does not end at the conversion of a lead into a new customer, but can be extended to existing customers through their life cycle. Continuously addressing existing customers should enable increased revenue generation through cross or upselling. Satisfied customers can also be turned into advocates for the vendor. Sixth, is changing the role of marketing from a pure lead generation entity to a partner with sales teams. As marketing is educating customers through different engagement points, the company needs to develop a vision of shared ownership between marketing and sales over the potential customers in the sales funnel.

According to Wizdo (2014), organizations that have implemented the L2RM framework have seen improvements in multiple areas in terms of contribution to business value. They experience a higher contribution of marketing to the sales pipeline and the measurements of the company’s performance is conducted on a more holistic level. With the help of marketing automation, companies can scale up their marketing efforts and target their audience with personalized strategies, leading to higher ROI. Also, L2RM reduces the inefficiencies in marketing processes through automation of marketing efforts as well as transparency of campaign performance and contribution to business value. Most importantly, the companies that have L2RM in place, understand which campaigns result in higher ROI and which campaigns do not contribute to business value, leading to informed spending of marketing budget rather than relying on gut feeling.

Implementing a L2RM framework in the researched organization aimed to optimize marketing efforts by understanding the sales funnel and eliminating inefficiencies in current marketing resource allocation and campaigns. However, multiple aspects of the researched organization needed to go through a change process in order to implement a revenue focused marketing strategy, as it required a business transformation. As evident from the literature, the L2RM framework requires a new mindset for not just for the marketing department, but also for the whole company. Moreover, new strategies, tools and techniques needed to be put in place to implement a L2RM framework in the researched organization. This change process additionally required changes within the marketing department and alignment with other departments. As implementing L2RM requires a major change initiative considering different aspects of a business, the conceptual framework presented in the next section positions the implementation of L2RM into the four building blocks that guided my research to take a holistic approach to implementation.

2.3 Conceptual Framework

Implementing L2RM in an organization requires managing change initiatives of strategic importance. According to Wizdo (2015), when considering the necessary changes to implement L2RM in the organization, marketers should not underestimate the business transformation needed for the organization to adjust marketing strategy, execution and technology. The amount of change that L2RM brings adds to the need for constant adjustment of processes and tactics, and this can result in stress, especially for marketing teams. If the stress resulting from change is not addressed and managed well, the implementation of L2RM might be at risk. In order to prepare for successful L2RM implementation, marketing leaders have to consider the current marketing capabilities in the implementation road map. Moreover, the L2RM capabilities leading to achievement of the final vision should be clearly communicated to all stakeholders.

Transforming the organization to focus on value requires careful change management as the change involves transformation in several building blocks that are to be affected. Verhoef, Kooge and Walk (2016) identify four building blocks of change when implementing data driven marketing strategies: processes; people; systems; and organization. Processes refer to a sequence of steps depending on predefined criteria, spanning from the marketing campaign creation to closing a deal with the customer. The processes should closely match the customer journey. The people aspect focuses on the changes of skills and mindset of the organizational members affected by the change initiative. The systems aspect involves the implementation of the necessary technologies to support the change. Organization refers to the changes to foster cooperation with other departments and to develop a data driven culture.

These four building blocks are interrelated and influence each other. Processes are an important factor on deciding the appropriate systems for an organization. While theoretically possible to devise the processes based on the system, it seems prudent to design the processes in the organization prior to deciding on a system, as the organization is already required to follow processes to act in their environment. The processes need to reflect the setting of the organization and the industry. Processes can also influence the people development as it can provide structure for teams to collaborate with other stakeholders. The systems component is an important factor that influences both processes and people. The choice of systems may support or hinder the implementation of efficient processes as well as skills to be developed. At the same time, systems should be adopted by people and may influence the necessary skills development amongst the organizational members. Facilitating cross-functional alignment and a change in mindset in the organization requires a change in mindset on the people side. Interactions between people make up the organization and the culture within the organization. In order to change the organizational culture, it is necessary to get the buy in of the members of the organization. Processes guide the functional interactions between the members of the organization. The organizational culture can influence the process execution, as different cultural aspects may dictate the appropriate processes for an organization. The organization can also influence the systems building block, since the organizational culture can have influence on the adoption and successful implementation of a system.

Figure 3 displays the conceptual framework of building blocks affecting L2RM. The main topics identified in this literature review have been grouped into the building blocks of change. It should be noted that the relationships between the building blocks do not necessarily share the same level of intensity. Each building block may be manifested in different magnitude during the data collection process. A detailed description about each individual building block is presented in the subsequent sections.

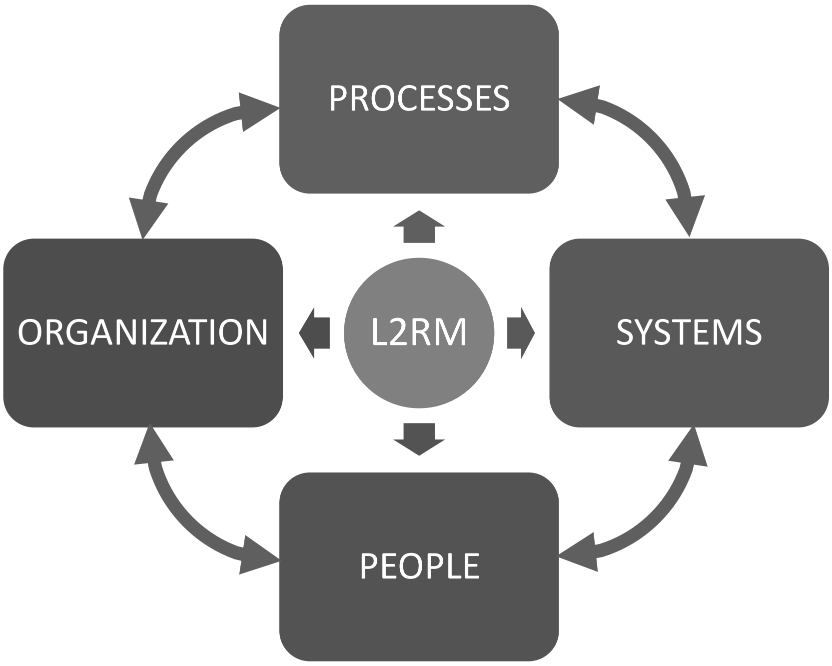

Figure 3: Conceptual Framework (Based on Verhoef, Kooge and Walk, 2016)

2.3.1 Processes

The processes that are affected through the change towards a revenue focused marketing strategy revolve around the sales funnel. Revenue focused demand generation processes involving sales and marketing functions should stretch from campaign creation to revenue generation seamlessly. However, the increasing role of marketing in sales cycles is making the marketing function move further down the sales funnel (Mintz and Currim, 2013). Defining the responsibilities of marketing and sales in these processes is important to removal of inefficiencies. Collaboration and a strong link between marketing and sales teams is one of the most important aspects of L2RM. In particular, the timing when a lead is being handed over from marketing to sales is critical and should be based on a set of criteria accepted by both sides. It requires commitment from marketing to provide leads qualified enough for sales to engage in direct conversations with the leads and commitment from sales to process and engage with the leads generated by marketing. If necessary, sales should be willing to hand leads back to marketing with sufficient explanation of why a lead is not qualified enough for sales interaction (Sabnis et al., 2013).

Wizdo (2015) suggests that the criteria to define if a lead is sales ready should be defined by the customer journey. Depending on the situation, some customers might be sales ready after they evaluate vendors on their own, while in other cases, customers might need to engage with sales representatives at earlier stages to be educated and nurtured. Additionally, a common marketing and sales team approach to working on the leads in the sales funnel is required. Collaboration between marketing and sales teams and alignment of marketing and sales processes can be improved through communication about prospects, including reasons for return of inadequately qualified leads to marketing for further nurturing (Sabnis et al., 2013). Moreover, having effective follow up of potential customers is key to improving the success of marketing campaigns (Oliva, 2006).

For successful L2RM implementation, it is important for sales and marketing departments to align processes. According to Oliva (2006), leads that have been passed on unsuccessfully are the result of sales and marketing having department specific standards, while the entire buying process should be seen as a continuum. Misaligned strategies between sales and marketing departments lead to inefficiencies in sales funnel (Oliva, 2006). Often there is a conflict between sales and marketing teams about lead generation and its subsequent management. A common complaint from sales departments to marketing is about the poor quality of leads provided; on the other hand, marketing departments criticise sales for poor management of leads and the need to improve follow up (Homburg, Jensen and Krohmer, 2008; Biemans, Brenčič and Malshe, 2010). Studies from the practitioner literature conclude that 70% of leads generated by marketing and handed over to sales teams are never followed up due to this misalignment (Marcus, 2002; Michiels, 2009). In order to align marketing and sales departments in B2B companies, Wiersema (2013) suggests the integration of marketing and sales systems. Mutual education and insights to customer relationship management strategies from the sales side and lead generation activities from marketing side could serve as a promising base for process alignment. From the aspect of technology, integration of marketing automation and customer relationship management systems can significantly increase efficiency on both sides (Kotler, Rackham and Krishnaswamy, 2006; Järvinen and Taiminen, 2016).

Optimization of the marketing and sales processes takes the combined efforts of all stakeholders (Fearon et al., 2013). Aligned sales and marketing processes facilitate higher visibility in sales and offer the potential to measure the performance of marketing activities in terms of revenue generation. Moreover, closed loop processes in which the outcomes of marketing and sales actions inform marketing decisions enable marketing teams to optimize the use of their budget through data driven decision-making. Companies that implement seamless, defragmented and closed loop demand generation processes are reported to increase their ROI (Wizdo et al., 2014), although it is difficult to evaluate the robustness of this observation.

Clearly defined sales and marketing processes are a necessity for optimal allocation of marketing resources (Fearon et al., 2013). Although marketing processes and sales processes were separately and vaguely outlined in the organization, they were fragmented and unaligned. In particular, the transition from marketing to sales processes was not defined and the process after prospects were handed over to the sales team lacked visibility to the marketing team. The lack of sufficient alignment between marketing and sales processes led to inefficiencies, reduced the opportunity for organizational learning from the outcomes of marketing and sales activities and hindered the organization's ability to measure marketing efforts in terms of revenue. As evident from the literature, aligning sales and marketing processes appears to be critical to improving these aspects of the organization.

2.3.2 Systems

Systems refer to the data and technology necessary to implement the change initiative. Information technology plays an important role in implementing an effective L2RM framework (Wizdo and O'Neill, 2014a); it allows speedy reaction to lead enquiries and the possibility of tracking customer behaviour, to get a deeper understanding about the customer journey. According to Oldroyd, McElheran and Elkington (2011), leads which have been created online need rapid engagement; as quick as replying to an enquiry within one hour increases the probability of entering into negotiations with a lead by a factor of seven compared to reacting one hour later. In order to enable such rapid reaction times, effective

IT tools need to be implemented. D’Haen et al. (2013) suggested that the integration of data about customer online behaviour with the lead scoring process offers the greatest potential. There is a wide array of automation tools for marketers to choose from in order to automate the lead to revenue process.

Marketing automation is the main systems enabler for implementing L2RM and it is one of the main tool for understanding the customer journey and optimizing marketing campaigns. Bucklin et al. (2002) define marketing automation as an automated marketing decision support tool, aiding analysis of the digital footprint of customers. Xu et al. (2002) describe marketing automation as one of the main characteristics in customer relationship management, where information on customers’ buying behaviours allows marketers to optimize their strategies. The first marketing automation solutions were developed with the goal of closing the gap that existed between lead generation activities and selling activities. But the evolution of marketing automation did not stop at that point. Current marketing automation tools are focusing on extending the role of lead creation into the sales funnel to allow market teams becoming the coordinators of customer engagement, spanning over the entire customer life cycle. The automation of this process requires the integration of marketing, sales and customer service functions (Xu et al., 2002). In order to identify the options compatible with the organization’s needs, marketing leaders need to evaluate the current state of systems, people and processes and define a future vision. Only after the coordinated process has been established should the suitable technology be decided upon. Marketing leaders also need to evaluate if the new software they are planning to implement has any overlaps with current technologies being used (Wizdo and O’Neill, 2014a).

Shaw (2000) identifies that the biggest potential of marketing automation is the ability to recognize patterns using algorithms to control complexity. Such marketing automation is designed to allow marketers to propose ‘the right offer to the right customer at the right time’. If well managed, marketing automation can take a pivotal role in sustained growth for the organization, with Shaw (2000) suggesting four steps of how to achieve it. First, marketing has to gather customer insights in order to create a steady stream of new opportunities. Second, marketing should focus on profitable customers and develop long term relationships. Third, understanding the reasons why customers leave will enable marketing leaders to keep the risk of losing further customers to a minimum. Fourth, using a clear value proposition will guide the organization to maintain value for customers. Biegel (2009) reviews marketing automation on a wider scale, recognizing that technological developments can automate a significant number of marketing processes, thereby increasing the efficiency, as well as the effectiveness of marketing activities. In fact, Biegel (2009) states that one of the foundations of digital marketing is marketing automation. Newberry, Wessner and DeCarlo (2008) suggest that marketing automation can aid in increasing the efficiency and effectiveness of marketing departments by supporting planning activities, such as budget and resource allocation or marketing calendar management. With the technological advances in managing big data, marketing can deploy systems to react in real time to customers behaviours (Zhang and Zhu, 2014).

Technically, marketing automations consists of software that is able to provide customized content based on specific rules decided by the marketing team. Marketing automation has at its core the goal to attract and build trust with potential and existing customers. In order to build relationships, marketing automation offers personalized and relevant content to the customers and potential customers; the software recognizes the offered content automatically based on the customer's needs (Kantrowitz, 2014). In a theoretical ideal marketing automation case, each person is treated based on his or her individual needs and delivered the most relevant content. Marketing automation therefore aims to facilitate meeting the individual expectations of customers in order to enable increased customer engagement (Montgomery and Smith, 2009). Marketing automation tools track the behaviours of website visitors by using cookies and linking them to IP addresses in order to identify individual customers and understand their behaviours over a longer time period. Visitors to the website have to first share personal information to enable behaviour tracking, by filling in a contact form for example (Wilson, 2010; Järvinen and Karjaluoto, 2015). Once the visitor has registered, marketing automation can learn actively and passively about them. The former approach would be characterized by asking the user questions and offering further content, while the latter approach is related to using information from prior behaviour and engagements. Marketing automation software can learn from these customer actions, personalize information and messages, and potentially identify in which stage of the buying process the user currently is situated at (Kantrowitz, 2014).

For most marketing teams, new IT capabilities are required in order to implement a L2RM framework, however, considering the alignment between the marketing, sales and IT departments, expected efficiency improvements may fail to materialize due to unexpected problems such as the resistance of employees to accept the new technology (Boulding et al., 2005; Perna and Baraldi, 2014). Because of this, it is important to realize that there are internal factors critical to the success of IT implementation, such as employee IT skills, complexity, quality of data or sources of data (Alshawi, Missi and Irani, 2011). Additionally, the different understanding of customer information that each functional department has, could pose a delicate topic to tackle when aligning and integrating business processes from different departments (Kotorov, 2003).

Misalignments between different departments can be a major cause for delays during the implementation stage, in particular differences between marketing and IT departments, but also between sales and marketing departments (Ryals and Knox, 2001). Perna and Baraldi (2014) find that characteristics of the users, such as age and openness to adopt IT tools, do have an influence on the implementation. A very important aspect to consider is the resistance to adopting IT capabilities due to the fear of individuals of losing control over their responsibilities (Homburg, Workman and Jensen, 2000). Jackson and Philip (2010) recommend using a participative approach involving all parties affected by the new IT system instead of a strict top down approach. Ahearne et al. (2012) suggest that in order to ensure successful IT implementation, it is vital to engage the sales department as one of the major stakeholders to reduce resistance. Additionally, implementing IT capabilities in the organization has to be presented in the right context of the organization; the bottom line of the implementation should be to increase efficiency within the company, and not to monitor or control the work of each individual. Emphasizing this difference can be the critical difference between an employee embracing the change or resisting it (Li and Mao, 2012).

In the researched organization, there was a need to understand the customer journey more effectively, improve the marketing efforts throughout the sales funnel and advance customer engagement. However, without marketing automation, the old system was not capable of handling sufficient personalization and targeting capabilities to deliver relevant content to potential customers in different stages of the sales funnel. Implementing marketing automation was intended to improve these processes in the organization and to facilitate the integration of the marketing and sales departments. In order to achieve the desired change in the organization, I believed marketing automation was an essential tool. Hence, implementing marketing automation was part of the change process. The marketing and sales departments have been using a multitude of technologies to manage daily operations; for this reason, the implementation and adoption of another tool was unlikely to be a major obstacle.

2.3.3 People

The paradigm shift of the digital era also requires a major change in the composition of marketing teams. It is becoming more important for marketing professionals to develop new skills in order to deal with big data and with the great complexity of the marketing channels. According to Day (2011), the digital revolution and changing customer behaviours have led to a gap opening between the increasing complexity of marketing responsibilities and the ability of marketing teams to manage and understand the increasing complexity. Wizdo (2014) argues that marketing teams which execute demand generation processes cannot succeed with L2RM without proper education and skill development. The early adopters of L2RM realized that in order to maintain and understand marketing automation systems, it was necessary to define new roles within marketing teams. This has been confirmed by scholars such as Anderson (2009) who observed that marketing departments have to develop new skills to keep up with the new challenges.

The increasing complexity of marketing tasks and responsibilities has increased the need for digital talent in marketing teams (Leeflang et al., 2014) and the need for digital talent is expected to increase rapidly in the coming years (Järvinen and Taiminen, 2016). Kumar et al. (2013) stated that one of the key challenges in implementing data driven marketing is the need to develop data capabilities and data orientation. The marketing teams need to be trained to understand and monitor data to discover trends and patterns and to create meaningful reports for easier comprehension (Kumar et al., 2013). The key skills needed in marketing teams include customer data analysis, digital advertisement creation and statistical analysis. Leeflang et al. (2014) saw the acquisition and the retention of such skills as one of the key assets for companies to ensure success in digital marketing activities. Professionals from other fields of study with a strong quantitative background could bring in the analytical skills which are needed to manage big data. However, they would need marketing training to enable them putting the data into a marketing context. Alternatively, companies may develop the analytical skills within the existing marketing teams (Leeflang et al., 2014). Professionals with the ability to understand web based behavioural data are likely to be as important as content marketers with the ability to create attractive content.

A related main barrier to executing successful L2RM is expected to be the creation of compelling content that is able to attract potential customers and nurture them through the customer journey (Wizdo, 2014). Holliman and Rowley (2014) have researched challenges among 15 content marketing professionals and found that developing or finding professionals with talent in content creation is a major issue for many companies. Practitioners try to close the gap by hiring writing talent and developing a customer-centric content strategy. If marketing teams master the challenge of content creation, another major change due to the digital revolution is the vast amount of information and ways of accessing information online. Inbound marketing skills to manage these highly technical marketing channels are critical for marketing teams (Dennis et al., 2009; Greenberg, 2010). An important aspect of the new digital era is the need to develop customer insights. The practitioner literature notes that the amount of customer data will continue to increase due to usage of different digital channels and sophisticated skills will be required to benefit from big data available (Wizdo, 2014). Scholars acknowledge the need for marketing to develop inbound marketing skills as a result of the opportunities presented by the digital revolution (Dennis et al., 2009; Greenberg, 2010).

Historically, marketing and sales departments in the organization have underused the available data while making decisions. The literature suggests that, in order to optimize value creation, a data driven mindset had to be developed. In addition to developing a data driven culture, the marketing department also needed to develop the analytical skills required to understand data and draw conclusions from it. Moreover, the marketing department needed to evaluate its inbound marketing skills and capabilities for generating relevant and compelling content. Accordingly, I concluded that the skills required for a revenue focused marketing strategy needed to be acquired in the organization in order to successfully implement L2RM.

2.3.4 Organization

L2RM can be categorized as a transformational change initiative (Wizdo et al., 2016). Transformational changes are characterized by fundamental and radical shifts in paradigms; the change is typically leadership driven and deals with adjustments to culture or strategy (Gilley, Gilley and McMillan, 2009); a successful transformational change initiative has a sustainable influence on the organization's vision, processes and values (Herzig and Jimmieson, 2006). Despite being a disruptive intervention to organizational operations, transformational changes are identified as resulting in higher competitiveness (Denning, 2005). However, it is necessary to acknowledge that perceived disruptiveness by the employees can produce some negativity toward the change initiative. Even though there is no direct relationship between change and negativity, negative emotions resulting from disruptive changes may reduce the level of trust in the organization (Kiefer, 2005).

The body of scholarly knowledge encompasses several theories about managing change. Caldwell (2003) explained the basics of change management with a change agency model. Change agents in the organization can take a supporting role in introducing, managing and executing the change initiative. Caldwell (2003) described four models of change agency, which are contingent on the situation. In other words, each of the four models is applicable in different situations, without having a 'one size fits all' approach. The most suitable model of change agency for this research is the so called 'team model'. It refers to a team of managers, employees and consultants who are seen as change agents, operating at various hierarchical levels in the organization. The team model appears to fit with action research and approaches such as the application of learning sets in the organization. One of the main benefits of this approach is the possible learning experience for the participants, hence creating a learning organization (Caldwell, 2003) and increasing the chances for successful implementation of L2RM. Fostering a learning environment is one of the strengths of using action research and learning sets. Chances of a successful transformational change in the organization are also greatly increased with sponsorship from top management (DeViney et al., 2012). Fearon et al. (2013) state that transformational changes need to go beyond systems and processes, and have to entail the social and cultural alignment. Considering people and organization, together with systems and processes are success factors in the implementation of change initiatives (Fearon et al., 2013).

As L2RM is a strategic change, it is of high importance to involve the top management into the change process. The changes are not limited to the marketing department, but affect other departments too. Besides the alignment between marketing and sales departments, alignment to other departments, such as IT and finance, are also influenced by L2RM. Hence involving leaders from those departments to discuss and align the vision around L2RM aids in achieving a more holistic L2RM implementation. Wizdo and O'Neill (2014b) recommended creating a cross-functional team starting from the planning stage, in order to draw knowledge from other functions and create an aligned process. The positive effects of working with cross-functional teams in change initiatives has been asserted by scholars across different fields (El Amrani, Rowe and Geffroy-Maronnat, 2006; Foss, Stone and Ekinci, 2008; Geiger and Guenzi, 2009).

According to Wizdo (2015), the starting point when implementing L2RM is to motivate the stakeholders by painting a clear picture of the vision and the new customer centricity. Explaining in clear terms how success is defined in this new process aims to help the teams to understand how to attract and retain customers. In addition, the vision that is presented to the marketing team should address the likelihood of changes in attitudes and culture. Even though alignment with other stakeholders is important in L2RM, the main stakeholder to pay attention to is the customer. However, it is also critical to receive the buy-in of the stakeholders within the organization throughout the change process. Clear explanations of decisions detrimental to an internal stakeholder but beneficial to the customer have to be communicated clearly (Wizdo, 2015).

Garetti et al. (2005) recommend a step by step implementation of change initiatives as a major strategy for successful change management. Their view is that starting with a step with the highest chance of being successful can increase the chance of successful L2RM implementation. On the other hand, the pressure to improve multiple aspects at once may tempt stakeholders to take on too many changes at once and hence move too fast. Achieving the changes does take time. A step by step approach allows the team to gather momentum (Wizdo and O'Neill, 2014b). As L2RM is more than just a set of tools or technologies to automate marketing processes, marketing leaders are urged to take the necessary change management into consideration. The teams need to become proficient with new technology and redefine their role within the organization. Having a change program in place to keep communication open facilitates the change in an efficient manner; Welch and Jackson (2007) described potential inefficiencies associated with poor communication.

Leeflang et al. (2014) argue that many organizations do not yet possess the ability and readiness to abandon classical organizational structures. The importance of managing digital marketing requires B2B companies to abandon the traditional silo mentality and create cross-functional alignment. Marketing teams have to shift their focus to deliver results, which requires a shift in mindset (Schaffer and Thomson, 1992). Considering the challenge of cross-functional collaboration, tensions between marketing and sales (Homburg, Jensen and Krohmer, 2008), marketing and product development (Leenders and Wierenga, 2008) and marketing and finance (Homburg, Jensen and Krohmer, 2008) have been widely researched in the academic field. In the practitioner literature, Wizdo and O'Neill (2014b) emphasize the need for the marketing function to collaborate with other organizational functions for successful L2RM, specifically with sales, finance and IT departments.

Misaligned strategies between sales and marketing departments lead to inefficiencies in the sales funnel (Oliva, 2006). The L2RM framework encompasses both sales and marketing activities and stretches from campaign creation to revenue generation seamlessly. In order to achieve this, sales and marketing teams should work collaboratively (Fearon et al., 2013). Alignment between sales and marketing departments facilitate higher visibility in sales and allow the potential to measure performance of marketing activities in terms of revenue generation. However, Knodel (2004) found that an increase in performance visibility could result in fear and insecurity among the employees.

The IT department of a company can offer great support in terms of technical aspects of L2RM, specifically the implementation of marketing automation tools and integration with sales systems. Assigning a dedicated person within the L2RM process to maintain connectivity to the IT department is expected to be beneficial. Effective implementation of new technologies to support the needs of marketing department requires strong collaboration between the IT and marketing departments (Wizdo and O'Neill, 2014b). Furthermore, alignment between marketing and finance has an important function, especially for marketing leaders. A good relationship with the finance department and a strong understanding of the financial models of the business as well as knowledge of how the profits are generated, are key success factors for measuring campaign contribution to revenue (Day and Malcolm, 2012). At the same time, a Chief Financial Officer who understands the marketing aspects and trusts the activities of marketing leaders, can be an important ally in tough economic times and when difficult decisions have to be taken considering limited resources (Day and Malcolm, 2012).

2.4 Concluding Words

This literature review examined two major subject areas from both a scholarly and a practitioner perspective and constructed the conceptual framework for this research: first, the paradigm shift in B2B marketing, the expanding scope of marketing as well as the challenges and opportunities from big data and data driven marketing, resulting from technological advancements of information products and from changing customer behaviours; second, recommendations for adoption of revenue driven marketing strategies through reviewing the role of the sales funnel, the importance of marketing performance metrics and introducing the concept of L2RM. Finally, the literature review integrated key issues from these two lines of research with the building blocks of change for implementing data driven marketing strategies.

In summary, the first line of research discussed the paradigm shift occurring in B2B marketing as a result of the digital revolution. Potential customers increasingly collect information through digital channels, prior to any direct engagement with sales teams, which has a significant influence on the buying decision. As a result, the responsibility of marketing is increasing and moving down the sales funnel (Mintz and Currim, 2013). This increase in accountability should be aided by abandoning classical silo mentality work styles and moving to cross-functional collaboration and aligning goals across departmental lines (Leeflang et al., 2014). In addition to new work styles, marketing teams need to leverage the increasing amount of customer behaviour data available in order to develop data driven marketing strategies and decision-making practices (Snijders, Matzat and Reips, 2012). The increasing usage of data in marketing decisions may result in higher contribution of marketing activities in business value and revenue (Järvinen and Karjaluoto, 2015).

The second line of research reviewed the connection between marketing performance and organizational performance, debated the B2B marketing performance measures and inspected the marketing strategies focusing on value creation. Marketing's increasing accountability in company revenue triggers the need for suitable performance metrics with a financial focus (Mintz and Currim, 2013). Frameworks such as L2RM focus on financial results allowing marketing teams to optimize campaigns and marketing channels in order to increase the revenue generated through marketing investments (Järvinen and Karjaluoto, 2015).

The literature related to L2RM has a strong practitioner focus since it is a concept developed from the practitioner world with limited theoretical and scholarly grounding. Although, scholars such as Habibi et al. (2015) and Leake, Vaccerello and Ginty (2012) discuss different models for implementing value driven marketing strategies, their approaches are not highly holistic. Practitioners put emphasis on disseminating best practices for other businesses (Wizdo et al., 2014), while scholars discussing result driven strategies emphasize the significant changes that marketing organizations are facing and focus on the readiness of companies to adapt to the changes resulting from the digital revolution (Järvinen and Karjaluoto, 2015; Leeflang et al., 2014).

Based on the examined lines of research I have identified the building blocks of change needed for implementing L2RM. Wizdo (2015) argued that, marketing professionals should not underestimate the business transformation required to implement L2RM in the organization. To facilitate the implementation of L2RM in the researched organization, four building blocks of change stand out as keys to implementing data driven marketing strategies: processes; people; systems; and organization (Verhoef, Kooge and Walk, 2016). These building blocks serve as the conceptual framework for this research.

The next chapter describes the research methodology in greater detail. The four building blocks of the conceptual framework informed the methodology, laid the groundwork for the data collection stage, as the interview protocol and the learning set meetings were developed based on this conceptual framework.

CHAPTER 3 - METHODOLOGY

This chapter presents the methodological framework applied for this research. It provides an overview of the status in the researched organization before the research and depicts the grounds that triggered this change project. This chapter also outlines pragmatism as the philosophical paradigm underlying to this research and action research as methodology. Moreover, the participants, selection criteria and the data collection tools are defined. Additionally, this chapter explains the data collection and the data analysis approaches used in this research.

3.1 Description of State Prior to Research

In the organization, historically there has been little emphasis on factual based and metric driven decision-making. This is particularly the case for the marketing and sales departments. The little use of metrics and KPIs often resulted in suboptimal decisions, as there was no clarity on campaign performance. Without this information, no predictions could be made about the expected ROI.

The sales funnel was roughly defined; however, it was not being used to its full potential. While there was some clarity in the early stages of the sales funnel, this clarity significantly reduced when transitioning prospects from marketing to sales responsibility. The stages in the sales funnel after the prospect has been handed over into the responsibility of sales department were not sufficiently visible to the marketing department. As a result, the marketing department was struggling to understand the value generated through marketing campaigns in terms of revenue. The low level of transparency in the sales funnel was a clear indication that marketing and sales departments applied the classical silo mentality approach. There was little collaboration between each other and a high internal focus. The lack of communication and cross-functional collaboration between marketing and sales teams resulted in unstructured and ineffective communication towards the prospect customers. It became evident to the organization from the lost opportunities that a joint approach of marketing and sales in the revenue generation process could offer advantages to the organization. Moreover, the tools available to the marketing team did not have sufficient capabilities for supporting personalization and targeting to deliver relevant content to potential clients in different stages of the sales funnel. The increased usage of digital channels from prospects was leading to an abundance of data and the marketing team did not possess the tools and the analytical skills necessary to sufficiently engage in data driven marketing and leverage the potential benefits from big data.

Acknowledging these inefficiencies triggered a change process in the organization. My role as a manager necessitated that I identify potential solutions to the inefficiencies in the demand generating process. In order to find and evaluate better practices I decided to use a cross-functional team, which consisted of organizational members likely to play a part in the change process. Members from the marketing, sales, finance and IT departments had been invited to take part. The cross-functional team decided to implement a L2RM framework in order to improve the visibility in sales funnel and optimize the revenue contribution of marketing campaigns. However, it was clear that implementing a L2RM framework required significant changes involving different aspects of the organization. This research project aims to understand the required changes in the organization for the successful implementation of the L2RM framework.

This research did not focus on the financial effects of implementing L2RM in the organization, as the sales cycles in the industry are often over a year. Because of the lengthy sales cycles and the necessary time to become proficient, the time needed to observe financial improvements exceeded the time available for this DBA thesis. The benefits of new customer acquisition, expansion on current customer base and increasing revenue with increasing profitability could only be seen after the completion of this research. Hence, the quantitative outcome of the change was not measurable within the scope of this research. Thus, qualitative research was deemed to be the most suitable approach for this research. As discussed in the literature review, implementing a result-oriented framework is a very complex change initiative, affecting many aspects and stakeholders of the company. Conducting a qualitative study allowed me to understand these complex interactions and to uncover problems which would not be observable with quantitative data. The next section discusses the research paradigm with relation to the research method.

3.2 Research Paradigm

The research paradigm of a study reflects how the researcher sees reality and understands the generation of knowledge. However, having a practitioner background made the identification of the suitable research paradigm a challenging task for me, as my main focus is to find what works best to resolve a problem. Saunders, Lewis and Thornhill (2009) state that adopting such a view is a sign of pragmatism being the research paradigm. According to Teddlie and Tashakkori (2003), pragmatism understands reality as unstable and constantly changing. The main reason for such a view on reality is that actions being taken constantly shape and change the reality. Furthermore, Teddlie and Tashakkori (2003) state that at the centre of pragmatism stands the research question itself, which guides epistemology and ontology.

According to Creswell and Clark (2007), the pragmatic ontology is characterized through multiple realities. Regarding epistemology, Creswell and Clark (2007) state that the researcher gathers data based on its suitability to answer the research question. Any thoughts or actions that lead to a pragmatic solution are useful and acceptable in pragmatism. The definition of Creswell and Clark (2007) closely describes my world as a researcher.

In terms of compatibility with action research, Teddlie and Tashakkori (2003) suggest that at times, the pragmatic researcher must interact with the researched object, while at other times, the researcher must stand apart from what is being studied. This resembles the action learning cycles, which are a part of action research methodology and alternate between action and reflection. Furthermore, Teddlie and Tashakkori (2003) state that the researcher should study what is of their interest and what could be adding value to the research. This statement closely resembles my understanding and approach to my research. However, it has to be noted that such an approach is prone to biases from the researcher. The reflexivity innate to action research is an important measure to ensure a more objective approach (Coghlan and Brannick, 2010). Therefore, I see pragmatism and action research as suitable and compatible with each other. The next section describes action research as research method in greater detail.

3.3 Research Method

The selection of action research for this research became evident by analysing my position in this thesis project. In practitioner action research, the researcher is a member of the organization being researched. The research is not carried out by pure observation, but through active participation with chosen participants. Action research accommodates research from the inside and seeks contribution from organizational members (Coghlan and Brannick, 2010). Action researchers are required to assume a dual role in the research. On the one hand, they have to facilitate improvements and create value to the researched organization; on the other hand, they have to generate new knowledge (McKay and Marshall, 2001). The outcome from the dual roles in action research is the creation of actionable knowledge, which aims to build an intellectual bridge between researchers and practitioners (Aram and Salipante, 2003). Greenwood and Levin (2007) defined actionable knowledge as being relevant to the organization and being rigorous to the scholar world. The application of systematic methods ensures the achievement of this objective. Argyris (2003) stated that the quality of actionable knowledge is ensured through reflection on action and a participative research approach.

Action learning is participative in nature and consists of action learning cycles. According to Coghlan and Brannick (2010), data collection in action research requires social contact to the organization. Every contact between the researcher and members of the organization are opportunities to engage in learning. Because of this characteristic, it offers participants the opportunity to engage in a self-learning process, which benefits each individual and the organization (Coghlan and Brannick, 2010). Applying a research method which enables learning for the researcher and the participants improves the overall sustainable benefit for the researched organization. In cases where the employees are required to adopt new work styles, learning acts as an enabler in the implementation of new systems or processes. The importance of learning in change initiatives is emphasized by change management scholars (Moran and Brightman, 2000; Robey, Ross and Boudreau, 2002). Together with the creation of actionable knowledge, these are important criteria that define why action research is suitable for this project.

The literature proposes several slightly different forms of action learning cycle. This research followed the four-step cycle described by Coghlan and Brannick (2010), which matches well with action research. The four phases are plan, act, observe and reflect. Action research encourages the researcher to complete more than one iteration of the action learning cycle. Completing several cycles improves the outcome and the quality of the research. The reflection phase at the end of each cycle serves as the basis for the planning phase of the next iteration, where the knowledge created is put into action.

For this study, I planned five iterations of the action learning cycle. The first cycle served as general planning cycle, while the latter four cycles were dedicated to one building block each. The action learning cycles served the purpose of identifying and understanding existing problems that required action for successful implementation of the L2RM framework in the organization. The learning sets followed action and reflection cycles to work on these problems in each of the four building blocks derived from Verhoef, Kooge and Walk (2016) (processes, people, systems and organization). Before presenting the research method in detail, the following section directs attention to the role duality in my insider researcher role and describes how I sought to manage the conflict of researching from the inside to ensure objectivity.

3.4 Insider Researcher Role Duality

Zuber-Skerritt and Fletcher (2007) state that the quality of action research relies on the multiple perspectives it considers. This is not only applicable for the different views of the participants, but also for the different views of the researcher. Practitioners conducting research take a metacognitive stance and pay attention to the rationale for their research. As Coghlan and Brannick (2010) state, insider action researchers who have a management role in the organization additional to their role as a researcher may encounter role conflicts. It is essential to take a step back from the manager role and have a neutral approach as a researcher. Furthermore, the interactions between the researcher and other members of the organization may present some challenges due to the role duality. The role as a researcher involves distancing oneself from prior relationships and interactions and adopting a neutral objective viewpoint but accepting subjective views (Coghlan and Brannick, 2010). Participants have to be aware of the dual role resting upon the researcher. According to Coghlan (2001), it is beneficial for the quality of the research to openly state assumptions to participants, as this helps in creating an understanding about the issue and supports the resolution process. Role duality is given and had to be dealt with while conducting this research. To create the right understanding, I advised participants about my dual roles as manager and researcher before they gave formal agreement to participation. Additionally, acknowledging my dual role as a researcher and a manager and reflecting on my biases and assumptions based on my preunderstanding of the organization was critical to mitigate the effects of the role conflict in this research. I used a research journal to guide reflection on the nature of my role duality and evaluate its effects throughout this research.

3.5 Participants

The participants for this research were selected based on purposive sampling, a sampling technique where the researcher decides on the inclusion of participants by utilizing their prior knowledge about the target population (Patton, 1990; Babbie, 1989). Using this sampling technique enabled me, as an insider researcher, to use my prior knowledge of the organization and individuals to be observed. Inviting members from different hierarchical levels to take part in the research permitted me and the learning set members to get a deeper understanding of operational and strategic issues. In terms of validity of the data, Lincoln (1990) and Noor (2008) argue that a fair representation of departments likely to be affected by a change initiative serves more than the purpose of holistic information as it increases the trustworthiness and validity. Moreover, according to Patton (1990), this sampling technique allows the researcher to gather rich information from a relatively small population. This offers the researcher the possibility to select the participants with a purpose in mind (Passmore and Baker, 2005). Therefore, this sampling method provided a good fit to this research project.

The potential participants for this research were approached in person and were chosen based on the individual’s function and level within the organizational hierarchy. Participants invited to take part in this research were members of the marketing, sales, finance and IT departments. The participants were selected both from non-managerial and managerial functions. Considering the necessary changes in processes in the organization, non-management employees tended to be more knowledgeable in terms of actual process related requirements and limitations. Managerial members were more likely to have a better view on strategic requirements. Therefore, representation from both groups was critical for this research. I identified 35 members of organization as potential participants. Table 1 presents an overview of the participants that agreed to participate and their corresponding departments. The identities of the participants are anonymized by a participant code.

PARTICIPANT CODE	DEPARTMENT
MAR1	Marketing
MAR2	Marketing
MAR3	Marketing
MAR4	Marketing
MAR5	Marketing
MAR6	Marketing
SAL1	Sales
SAL2	Sales
SAL3	Sales
SAL4	Sales
SAL5	Sales
OTH1	Other
OTH2	Other

Table 1: Participant List

Participation in the research project was voluntarily and the identity of the participants has not been revealed. Participants had the possibility to withdraw at any point without stating the reasons for withdrawal. It was made clear that the data collected was stored on password encrypted media, only available to the researcher.

3.6 Data Collection Process

I collected qualitative data in order to understand the complex interactions in the organization and guide the change in processes, systems, people and organization. The research was considered complete when there was a framework in place providing the ability to gain a clear line of sight from campaign level to the company revenue, allowing the marketing department to identify individual campaign contributions to the revenue generation. This completion point also concluded the data collection process. Moreover, the completion of the data collection process was aligned with the organizational goals.

The data collection methods applied in this study were interviews, learning sets and keeping a research journal. Different methods of data collection were chosen to increase the validity of the findings. Greater detail about data validity is presented in Section 3.8.

The research was conducted in full coherence with the ethical guidelines issued by the University of Liverpool and the research received approval from the DBA Research Ethics Committee of the University of Liverpool. In order to ensure privacy, all collected data was stored in a password protected database, stored on a password protected personal laptop available only to myself. The data collection and storage processes complied with the University of Liverpool ethics guidelines and policies. Documents, such as the consent form, the participation information sheet and the full ethics application form also underwent review by the ethics committee and received approval. The approval page is available in Appendix A. Prior to approval, no potential participants were contacted about participation in this research, nor did any data collection taken place. More detail of the data collection methods utilized in this research is provided below.

3.6.1 Interviews

Interviews were used as one of the data collection approaches of this research. According to Creswell (2015), interviews are suitable to very complex problems when researchers have to gather complex responses to solve the problem. Interviews are used to understand behaviours and to collect data which cannot be gathered through observation (Holstein and

Gubrium, 2004). In this research, the participants interviewed were offered the possibility to express their thoughts and intentions. The interviews were recorded, encrypted and stored. Personal data about the interviewees was anonymized through codes. A backup version of the interviews was saved on a password protected external hard drive.

The interviews were semi-structured, following a structure defined by the interviewer, but also offering flexibility for the participant and the researcher to deviate from the plan if new relevant information was uncovered (Patton, 1990). The questions sought to guide the participants to define their perception of the current state of the organization from relevant aspects, understand their perception of the desired future state and identify the aspects that require a change. The questions in the interview protocol were phrased as open ended questions in order to encourage ample and deep answers. To obtain a cohesive structure for data collection, the questions of the interview protocol were grouped into the four building blocks that form the conceptual framework of this research. The questions also explored any additions or changes to the building blocks that were not covered in the conceptual framework. However, all responses obtained via the interviews referred to one or more of the building blocks, confirming the good fit of the conceptual framework to this research. The interview protocol is available in Appendix B of this thesis.

The interview protocol was first piloted with one participant, in order to evaluate the clarity of the questions asked and the depth of answers the questions provoked. After completing the pilot successfully, the rest of the interviews were conducted. Thirteen participants were interviewed over a three-week period. Out of the 15 participants who were originally recruited to take part in the research, two participants could not take part as initially planned, as one of them withdrew their participation due to time constraints and the other participant left the company during the data collection process, hence their participation to the research was not possible. However, the sample of 13 participants was sufficient to collect representative qualitative data for this research.

The interviews were conducted in a private meeting room, with the presence of only the interviewee and the researcher. The structure of the interview protocol was followed and participants were probed in certain cases to get deeper answers. If replies were leading to other aspects of the research area, the participants were not interrupted in order not to obstruct the flow of ideas. All interviews were audio recorded and transcribed by the researcher.

After collecting and organizing the data, I coded the transcriptions. As a part of this process, I read each transcript multiple times, highlighted important and relevant words or text passages and applied codes. Each unique code was kept on a master list. Afterwards, the applied codes were reviewed for consistency and replaced where necessary. After all interviews were coded, I grouped the generated codes into categories and building blocks of the conceptual framework. A detailed description of the data analysis process is provided in Section 3.7.

It should be noted that the interviews focused on identifying current and expected problems in the organization. Any positive aspects discussed by participants have not been considered in the thesis write up.

3.6.2 Learning Sets

Learning sets were used in this research to plan and reflect on actions. A learning set in terms of action research is described by Davey, Lowe and Duff (2001), as a group of people who meet regularly to solve real problems or difficulties. Participants are encouraged to question ideas and to test possible answers with a friendly and personal tone (Hughes, 2001). The learning set is guided by an advisor or facilitator, who encourages learning set members to act and reflect upon experiences. The facilitator of the learning set is usually the researcher, who has to acknowledge the multiple roles that are resting upon the researcher (McGrath and O'Toole, 2012). According to McGrath and O’Toole (2012), the researcher can prepare by conducting an extensive literature review, or by having expertise and in-depth knowledge about the particular business situation. Both instances apply to this research.

The learning sets aimed on the one hand to facilitate progress towards improving the organisational issue by allowing the members of the organization to discuss and take action about a specific problem. On the other hand, the learning sets also aimed to encourage learning among the participants, since they are offered the opportunity to exchange their ideas in an open environment and are encouraged to reflect on their actions. The learning sets for this research took place with six selected participants in a separate meeting room. The learning set participants were selected to most suitably represent the stakeholders involved in the change process. The scope of the learning set was to identify required aspects of organizational change in processes, systems, people and organization as well as the potential challenges to implementing the change. Participants were informed that the decision to implement a L2RM framework was fixed and out of scope of the research. This was a necessary step in order to drive the focus of the learning set to the relevant issues.

The learning set aimed to provide an action planning, reflecting and learning opportunity for the participants. After explaining the concept of L2RM, the learning set focused on identifying tasks which could benefit from cross-functional approaches, as well as identifying factors which could ease the implementation itself. During the learning sets, my dual role encompassed the role of moderator, guiding the discussions and paying attention to the contribution of participants; and as observer, taking notes about discussed topics, points of agreement and disagreement, as well as taking descriptive notes, capturing aspects such silence or emotional reactions.

The members of the learning sets met in total for six learning set meetings, with each meeting being scheduled for two hours to offer time for ample discussion. The learning set had biweekly meetings that served as a platform to collaboratively work through the four stages of the action learning cycles. Only the time between the last and prior to last learning set meeting was increased to three weeks due to limited availability from the participants.

After the first learning set meeting where actions for the first cycle were planned, the subsequent learning set meetings offered the chance to reflect on the actions undertaken. At the same time, each learning set meeting aimed to plan the action items for the next cycle. The act stage of the action learning cycle was carried out in the two-week periods between each learning set meeting. The two-week timeline for actions was adhered to, wherever possible, to ensure that the actions were taken in a timely manner and the learning set was able to reflect on the taken actions during its next meeting. However, some actions were scheduled to a later time based on the feasibility of taking immediate action. The observe stage of the action learning cycle consisted of my direct observations as the researcher, as well as information I gathered from other members of the organization.

3.6.3 Research Journal

Using a research journal enabled me to record my observations and experiences throughout this research. According to Rowley (2003), journal keeping reveals its benefits of triggering reflection when the researcher reviews the notes. Regular entries and reviews are a method to ensure the reflexivity of the research according to Cunliffe (2004). The researcher also has the opportunity to assess their influence on the research.

According to Guba and Lincoln (1994), the research journal plays an important role in the data analysis process. The researcher should use the research journal as a tool to note their reflections on patterns and concepts emerging from the data. In this research, I used a research journal as an overarching tool to record my observations and reflections during the action learning cycles. These entries supported the data collection process. The research journal also contains personal reflections about each of the data collection stages as well as the data analysis and discussion stages. Extracts from the research journal enriched this research by adding reflective thoughts to the research results and discussions. An extract of the research journal can be found in Appendix C.

3.6.4 Timeline of Data Collection

The interviews for this research were scheduled to occur first. The interviews aimed to uncover the perception of participants regarding the challenges for implementing L2RM in the organization. Based on the conceptual framework, participants were asked to explore the challenges in terms of processes, people, systems and organization. After the interviews were completed, the emergent topics informed the topics to be discussed in the learning sets and the action learning cycles. Table 2 displays the timeline for the data collection interventions.

TIME	ACTIVITY	AGENDA
Week 1-2	Interviews	Problem Identification
Week 3-4	Learning Set 1	Action Learning Cycle 1: Launch Plan
Week 5-6	Learning Set 2	Action Learning Cycle 2: Processes
Week 7-8	Learning Set 3	Action Learning Cycle 3: Systems
Week 9-10	Learning Set 4	Action Learning Cycle 4: People
Week 11-12	Learning Set 5	Action Learning Cycle 5: Organization
Week 13-14	Learning Set 6	Final Review and Evaluation

Table 2: Data Collection Schedule

3.7 Data Analysis Process

After collection of the necessary data, the data analysis process was the next step towards investigating the research questions of this project: "What are the success factors in terms of processes, people, systems and organization for implementing L2RM in the organization?" and "How can these factors be managed for successful implementation of a L2RM framework in the organization?". When working with qualitative data, the data analysis process entails the preparation and organization of the data collected (Creswell, 2007). At the core of this process were the data collected from the semi-structured interviews, the learning sets and the research journal. In addition to the notes taken during the data collection sessions, this formed the majority of data to be analysed. The main task of the data analysis process was iterative coding of the data. Coding can be understood as "reducing the data into meaningful segments and assigning names for the segments" (Creswell, 2007: 148).

The data analysis process developed for this research was based on thematic analysis as described by Braun and Clarke (2006). The thematic analysis consisted of five phases. Extracts for phases one, two, three and four can be found in Appendices D, E, F and G respectively.

Prior to starting the thematic analysis, the interview transcript to be analysed was reviewed in order to become familiar with the data. The benefit of reading the transcripts without taking any written notes was to listen to what the data had to say and to identify patterns (Braun and Clarke, 2006).

The first phase of the thematic analysis consisted of reading the transcripts and highlighting text passages. Each highlighted text passage was assigned a code to describe the content of the text passage. Appendix D contains an example of this stage.

In the second phase, the initial code list was condensed to a more comprehensive list by grouping thematically related codes. Appendix E contains an example of the condensation of the initial codes into thematically related codes.

The third phase entailed combining codes from the second phase into categories based on commonalities to facilitate and inform further analysis. In this phase, the created categories were also assigned to the most relevant building blocks. An example of this phase can be found in Appendix F.

The fourth phase consisted of interpreting the data and making sense of it. Part of this phase was the selection of relevant quotes to support the narrative of the research. While working on this phase, I realized that some of the condensed codes created during the second phase were too similar to each other. Therefore, I revisited the condensed codes and merged them further. An example of this phase can be found in Appendix G.

The final phase of the data analysis process consisted of writing up the results of the research. The results of the thematic analysis are summarized in Table 3 (Chapter 4).

After interpreting the interview data, a presentation of the data in text and tabular form was prepared. During this process, the anonymity of the participants was maintained, as no names were mentioned. The participant codes were used in references to group and individual discourses.

The data analysis from the action learning cycles was based on two data sources. First, the records and minutes from each learning set meeting facilitated a descriptive narrative of the meeting. Second, I kept personal observations in my research journal and took notes during the learning set meetings and during the execution of the agreed upon actions. The data from the research journal enabled me to enrich the descriptive account with my personal observations and reflections from the learning set members.

3.8 Data Validity

The data collected during this research was triangulated in different ways and showed that the findings from multiple data sources were overall consistent. The interviews were used to identify the existing problems within the organization and served as a basis for the subsequent learning set meetings. During each learning set meeting, the problems were presented to the learning set. The findings from the interviews about the problems existing in the organization were confirmed by the learning set members. Furthermore, the interview findings were not only validated via data collected through the learning set sessions, but also via data collected in discussion with other members the organization during the action learning cycles and recorded in my learning journal.

The research journal served as a data source overarching the entire research. Findings from the literature review, the interviews and the learning sets have been further validated with my journal entries including my observations and reflections. Furthermore, the findings from the interviews and from the learning sets were compared and validated via findings identified in the literature.

3.9 Concluding Words

This chapter described the methodological approach undertaken in this research. The chapter presented a description of the researched organization prior to the decision to undertake this research and depicted the factors triggering this change process. Suboptimal decisions regarding marketing budget campaign allocation and the insufficient measurability and transparency in sales funnel formed the starting point for this research. Prior to this research, a cross-functional team, which consisted of members of the organization took the decision to implement a L2RM framework in order to improve the inefficiencies in the organization.

After defining the existing situation in the organization, this chapter described the philosophical assumptions of this research. Pragmatism has been identified as the suitable research paradigm, which sees reality as unstable and constantly changing (Teddlie and Tashakkori, 2003). The pragmatist puts the research question itself into the centre, which guides epistemology and ontology. Identifying the philosophical underpinnings to this research also informed the choice for action research as a research method. Conducting this research as a member of the organization required keeping a reflective distance from the organization, which is accommodated in action research (Levin, 2008). Action learning cycles ensured that the research put sufficient emphasis on reflecting on the actions taken (Coghlan and Brannick, 2010).

This chapter also explained the participant selection criteria, addressed insider researcher role duality, provided an overview to the data collection methods used in this research and discussed the data validity. The data needed for this research was qualitative in nature, which guided the selection of specific data collection tools. The qualitative focus of my research led to selection of interviews, learning sets and journal keeping as data collection methods. To select suitable participants for the interviews and learning sets, purposive sampling was used. Thematic analysis was chosen as the data analysis method to make sense of the gathered qualitative data. Finally, the triangulation of data from interviews, learning sets, research journal and literature was employed to ensure data validity.

After presenting the methodology of this research, the next chapter offers a detailed description of the results of the research, identified from the analysis of the three main data collection methods.

CHAPTER 4 - RESULTS

This chapter provides a descriptive account of the results identified from analysis of the three main data collection methods of this research: interviews, learning sets and the research journal. There were two main data collection stages: interview and learning set stages. Each stage served a different purpose and contributed differently to this research. The research journal served as a support for observations and reflections during both the interview and the learning set stages and provided an overarching resource for analysis and reporting of results.

The interviews were used as a method to identify the most problematic areas with regards to L2RM in the researched organization. The interview was designed in line with the four building blocks from the conceptual framework of this research: processes, people, systems and organization and targeted for participants to think about the present state of the organization, as well as to identify the ideal state and gaps to it. The issues identified from the interviews built the basis for the learning sets, as each issue has been addressed in dedicated learning set sessions for each building block. The learning set followed the action learning cycles to plan and later reflect on the action items to tackle the identified issues. By using a learning set consisting of members from the organization, it was ensured that the action items were relevant and specific to the organization.

4.1 Interview Stage

The results from the thematic analysis of the interviews are presented in this section. The thematic analysis used in this research is explained in detail in the methodology chapter, Section 3.7. Examples of the thematic analysis phases are available in Appendices D, E, F and G. A summary of the identified categories and codes in each building block is represented below in Table 3. The categories and codes have been sorted based on the number of responses as well as considering the logical order. The identified challenges are presented in the next section.

PROCESSES		Responses
Structure Issues	Marketing and sales processes are not clearly defined	10
	Role division in sales funnel is rapidly changing	9
Alignment Issues	Mutual knowledge of processes is lacking	9
	Sales and marketing processes are not transparent	11
	Feedback system for performance measures is lacking	5
PEOPLE		
Skill Limitations	Analytical skills in marketing need improvement	7
	Marketing and sales do not have a data driven approach	6
	Inbound marketing skills need improvement	4
Collaboration Issues	Collaboration of marketing and sales is insufficient	10
	A consistent information exchange platform is lacking	6
SYSTEMS		
System Limitations	Engagement with new leads is slow via current system	8
	Available customer journey insights are not sufficient	6
	Personalization and targeting capabilities are lacking	6
Adoption Issues	Fear of losing control is creating scepticism	6
	Not being involved in selection may lead to resistance	4
ORGANIZATION		
Interdepartmental Issues	Departmental goals are unclear and unaligned	10
	Ownership of departmental responsibilities is unclear	6
Cultural Issues	The company mindset is not highly result driven	10
	Informal organizational culture leads to inefficiencies	8
	Increased visibility of performance is creating insecurity	4

Table 3: Summary of Data Analysis from the Interviews with 13 Participants

4.1.1 Processes

The first section of the interviews focused on the perception of participants on the sales and marketing processes in the company. Participants were asked to elaborate on their understanding of the existing processes, their idea of the ideal processes as well as the inefficiencies and need for change in the existing processes. Answers from the participants revealed two major categories of issues related to the processes. The first category was structure issues, which refers to the issues related to an unclear definition of marketing and sales processes as well as the changing roles in the sales funnel. The second category of issues were alignment issues, which relates to the lack of mutual knowledge of processes, lack of transparency in marketing and sales processes and the lack of feedback mechanisms hindering the performance measures.

Structure Issues

Structure issues refer to problems regarding inadequate clarity in marketing and sales process, as well as a shift of roles in the sales funnel. Improving the process structure is critical to the implementation of L2RM because many stakeholders are involved in the process and clear roles and responsibilities and the clarity of transition stages in the process are necessary for efficient and successful execution (Järvinen and Taiminen, 2016).

Marketing and sales processes are not clearly defined

One of the most commonly mentioned problems in marketing and sales processes was the lack of clearly defined processes, leaving a grey area between marketing and sales and leading to inefficiencies as well as frustrations. Ten participants emphasized the lack of clear definitions of processes between marketing and sales as a major challenge. One participant stated that the processes were not consistent and subject to change depending on the people involved:

> *"End to end marketing and sales processes are way too chaotic. I guess the process depends on whoever is working on a task. I think everyone does what they think works best, but there aren't really any written guidelines or structure that I'm aware of. On one hand, this gives us the flexibility to take quick action, on the other hand, no one really knows how things work as a whole. Also, things change every time a new person joins. This is of course very inefficient."* (SAL2)

Another participant expressed the view that inefficiencies in marketing and sales efforts were resulting in wasted resources and frustration due to the lack of clear process definitions:

"Both [marketing and sales departments] seem to miss out on a lot of aspects. I often see that they do double work, while there is a lot of uncovered ground, where no one really knows what to do or who is responsible. This is causing not only inefficiency, but also confusion and frustration." (OTH1)

Participants also stated the need for clearly defined processes in order to mitigate the inefficiencies, the potential risk of misunderstandings and misalignment. One participant emphasized the importance of defined responsibilities:

"The ideal process should be well defined with a clear sequence of steps. How these steps in the process work should be crystal clear to all people involved. If we can manage to follow a structured process like this, I can imagine things to move forward much more smoothly. This would also make our jobs much easier when on boarding new colleagues." (MAR2)

Role division in sales funnel is rapidly changing

Another structure issue, which was frequently pointed out by the participants, was changing roles in the sales funnel due to changing customer behaviour and the challenges this change poses. Nine participants emphasized that the roles of marketing and sales in the sales funnel have been significantly changing in the demand generation process. One participant observed that the company has not yet reacted properly to this changing environment:

"We have seen that marketing's role is expanding, but we haven't been able to catch up with this change so far. We tried punctual improvements, but no holistic approach. As a result, we only have a patchwork." (MAR1)

Some of the interviewees specifically identified that changes in online behaviours of customers are pushing marketing to expand their scope in the demand generation process and identified changes in customer behaviour as the main driver for this development. One interviewee described the potential shortcomings as a gap that marketing department has to fill:

"The changing market, the changing prospect is forcing marketing to put more effort into demand generation. The prospects are involved with the company a lot further in the sales funnel compared to before. If we had more control on the online interactions with the prospects early on, it would be a huge benefit for us." (MAR4)

Another participant emphasized the need for the marketing department to expand its role within the sales funnel to meet the changing needs of the prospects:

"Sales doesn't have the chance to talk to the prospects beforehand. Today, prospects are so well informed about everything before we even get a chance to say 'Hi'. We [sales] cannot step into this void, it's marketing that has to step up and use this chance." (SAL4)

The importance of swiftly adjusting to the changes in the environment has been emphasized by the participants. Participants stated that without adapting to the fast-changing competitive landscape, the company is running the risk of losing competitiveness. One participant expressed the importance of increasing the scope of marketing in addressing market needs and the overall company success:

"The role of marketing is expanding. If we don't expand our scope, we are at risk of not addressing the market correctly. We are in a very competitive industry with rapidly changing competitors and marketing plays a key role in the company's success." (MAR1)

Alignment Issues

Alignment issues entailed the scarce knowledge regarding the mutual processes between marketing and sales departments, the insufficiency in transparency into marketing and sales processes, as well as the insufficient exchange of feedback between both departments. Aligning stakeholders is critical to this project since end to end transparency and accurate feedback mechanisms are key to enabling accurate performance measures (Kotler, Rackham and Krishnaswamy, 2006).

Mutual knowledge of processes is lacking

Interviews revealed that the participants have limited knowledge about mutual sales and marketing processes and the knowledge of participants is often only within their own area. While participants often have the knowledge about their internal processes, nine participants said they did not to have in-depth knowledge about the entire demand generation process. One participant expressed that information about the processes was not readily available:

> *"I know the marketing side, but I don't know what is supposed to happen once the leads are handed over to sales. We just hope that they will be converted into customers and wait. [...] I would like to know more about the sales processes and if these processes are correctly followed, but I don't know where I can find this information."* (MAR4)

On the other hand, another participant stated that knowledge about the entire demand generation process was not necessary:

> *"I'm not sure if I know the whole demand generation process in detail. I don't have many insights into the process on the marketing side, but I also think that it's not necessary for sales, as long as the outcome is good. I'm fine with any process as long as results are there."* (SAL3)

Another interviewee stated that a wider involvement in the demand generation process may result in inefficiencies and lack of focus:

> *"Everyone has a specific role and specific focus. If everyone is involved in the whole process, we are not going to achieve our targets because we lose focus."* (SAL5)

Sales and marketing processes are not transparent

Interviews also revealed that the limited knowledge about the end to end marketing and sales processes is often perceived as the result of a lack of transparency from the other side. Eleven participants mentioned the lack of transparency as an important issue; however, there was a significant division of opinions between the participants from the marketing and sales departments regarding the reasons for the lack of transparency. Interviewees from the marketing department stated that they are kept in the dark about sales activities, once a lead had been handed over to the sales department. In contrast to this view, respondents from the sales department highlighted their concerns about receiving too little information from the marketing department about the leads they received. Five of the six participants from the marketing department said they had no insights into sales activities once a lead was handed over. One participant described his lack of knowledge about lead status after it had been passed on to sales by saying:

> *"What happens with the leads after we hand them over to sales is like a black box to me. I have no idea what happens. I only learn about what happened with a lead if we close a deal. I don't even ever hear the deals we have lost. You need to dig really deep to get any info from sales folks, especially if it is not good news"* (MAR3)

Another participant expressed that an increase in transparency could improve the efficiency of communication:

> *"It would be really huge for us to know what does sales do with our leads. What is their approach? How do they engage with the leads? Do they apply the same strategy to all leads? Is their approach consistent? It would really help to know the answers to these questions. By knowing what they do, we could maybe find ways to improve our communication, standardize the information we share. But sales doesn't share this information with us."* (MAR5)

In contrast to the opinions of the participants from marketing, four of the five participants from the sales department referred to lack of coordination from marketing as the reason for the low transparency. One participant expressed the lack of information from marketing department about the leads once handed over by saying:

> *"The only point of touch before we receive a lead is marketing, so we don't have any opportunity to get in touch with the prospects at that level. When I receive a lead, I often have no idea on what kind of interactions that lead previously had with us. [...] sometimes there is a history of interactions spread over years and I could use that information in my pitch, but I learn about this too late mostly."* (SAL3)

Another participant from the sales department emphasized the lack of concrete information provided about marketing activities:

> *"I hear a lot of buzz words from marketing. I hear about campaigns on different channels, content marketing, social marketing, but I have no idea how they influence our leads before we get to work with them. Basically, I have to start with every lead from scratch."* (SAL5)

Feedback system for performance measures is lacking

Another commonly mentioned issue was the inability to measure the end to end demand generation performance and therefore not being able to learn from the outcomes, leading to suboptimal results. Five interviewees stated that there are no accurate performance measures in place for measuring campaign performance. One participant stated the need for measuring campaign performance to increase ROI:

> *"One of our main inefficiencies in our processes is that we don't know anything about our real campaign performance. Everything falls into one bucket. If we could see into the entire process, we could measure our campaign outcomes and our return on investment."* (MAR 1)

Another participant expressed the need to understand campaign outcomes to measure success:

> *"After we launch a campaign, we can see the initial interaction it creates, but very quickly we lose track of the results. We don't know if it helped us to get any customers. A campaign might generate a lot of attraction at first but if no one buys our product, we cannot call it a success. It would be great to know what really happens in the end."* (MAR4)

4.1.2 People

The second section of the interviews focused on the people building block. Participants were asked about their perception regarding the essential skills for sales and marketing teams and the skills that currently require improvement, as well as the alignment between marketing and sales departments. The replies from participants indicated two major categories of issues within the people building block. The first category of issues focused on skill limitations. The responses mainly indicated the insufficiency of analytical skills and inbound marketing skills, as well as the absence of a data driven approach. The second category of issues that was identified involves collaboration issues. The collaboration between marketing and sales was deemed to be insufficient and having room for improvement. Additionally, participants identified the lack of a consistent information exchange platform as an obstacle for collaboration between marketing and sales teams.

Skill Limitations

Skill limitations refer to the skill sets which required improvement, such as analytical skills to work with and interpret data to evaluate the campaign performance, inbound marketing skills to set up new campaigns, as well as developing a data driven approach. Developing these skills is important to efficiently operate and execute the tasks involved in a result driven strategy (Kumar et al., 2013).

Analytical skills in marketing need improvement

The majority of participants emphasized the need to improve the analytical skills in the marketing department. Seven participants stated that the marketing department lacks the necessary analytical skills to work with data. One participant described the need for the marketing department to expand their skill set beyond traditional marketing skills in order to address the needs of the prospects:

> *"I think that, traditionally, marketing teams needed to be strong in communication skills and had to be good in writing, good in branding. You know, more on the verbal side, not that much on the numerical side. However, the needs are more increasing to the technical side. We see that we need to work more with data than ever before [...] but most people in the team are missing the expertise to work with data. That's why we are not addressing our prospects properly"* (MAR2)

Another participant emphasized the role of data in improving marketing performance:

> *"The technical skills for marketing are getting more and more important. Now, we see it quite often that the marketing people understand the customer journey [...] and base their decisions on the customer insights and behaviours. However, understanding this, requires understanding data, being able to dive into data, being able to run experiments, running A/B test, multivariate tests. All these require significant understanding of data, which we don't have enough of, [...] both from a numerical perspective as well as being able to use different tools to be able to set up these kinds of experiments. Without it we will never be able to step up our game."* (MAR1)

One interviewee expressed concerns about the increasing need for working with data and the fears involved:

> *"I know that we are moving towards a more data driven reality. I don't want to speak for everyone in here, but I don't think that most of my team know how to deal with the wave of data that is coming towards us. It is very, very scary."* (MAR4)

Marketing and sales do not have a data driven approach

Interviews also revealed a tendency to make decisions based on gut feelings rather than adopting a data driven mindset. Six participants stated that the marketing and sales departments need to increase the usage of data in their roles. One participant expressed the need for a data driven approach to reduce inefficiencies:

> *"I think we should embrace a more data driven approach. There are of course a lot of cases where we don't have the necessary data easily available. But I would also say that we don't really look for data. We are not actively asking for data. That is a problem and I think a lot of our inefficiencies come from this."* (SAL4)

Furthermore, several participants stated that the marketing and sales departments are using intuition, gut feeling or experience as basis and justification for decision-making. A participant stated that data rarely plays a role in decision-making processes as it is seen as difficult to work with:

> *"Honestly, we often just decide based on what feels right and sounds good. I want to use more data, especially when I am leading a campaign and have to present it to the team, but trying to find the right information is so difficult. Analytics is not really my thing."* (MAR2)

Inbound marketing skills need improvement

Additionally, some participants mentioned that the intuition based decision-making may be leading to suboptimal results. One participant expressed concerns for wasting resources as the result of insufficient data use:

> *"We don't use nearly enough data when we plan campaigns and then we hope for the best, but it is actually painfully obvious that we might be wasting a lot of our resources"* (MAR2)

Another issue that was mentioned by several participants was the need to improve the inbound marketing skills. Four interviewees stated that the current capabilities in inbound marketing were not sufficient to fully address the market. A participant identified specific skills that have to be developed to reach the desired goals:

> *"One main area to improve is our inbound marketing capabilities. I think we have to improve our content creation, display, search marketing, social [marketing], [lead] nurturing, growth hacking, all of these are tactics which we need to make full use of to get to where we want to go. If we don't, we'll never reach to that level"* (MAR1)

Collaboration Issues

Collaboration issues entailed problems between the marketing and sales departments in terms of insufficient collaboration and information exchange. Collaboration between the involved stakeholders is crucial since incomplete or incorrect information provided puts the effectiveness of L2RM at risk. In particular, collaboration between the marketing and sales departments is essential for a seamless sales funnel (Fearon et al., 2013).

Collaboration of marketing and sales is insufficient

The interviews also exposed collaboration related issues between sales and marketing teams. Ten participants stated that the current collaboration is insufficient and increasing the collaboration between sales and marketing departments is important for success. A participant stated that the marketing and sales departments were more interested in pushing their own agenda than seeking collaboration:

> *"I think we often committed the mistake in the past of not working together. We focused too much on our own work, our own agenda. We are missing the right mindset for that. When I think about the alignment, I am thinking about how marketing and sales go against each other in every chance."* (MAR2)

Another participant stated that the reason for insufficient collaboration between the marketing and sales department was due to lack of communication:

> *"I don't think that marketing and sales collaborate much. There hasn't been a lot of incentive. When our desks were in the same room, we used to talk and bounce off ideas, but since we moved, the teams sit far from each other, we only talk when something is going wrong."* (SAL4)

Another participant stated that the goals of marketing and sales departments did not align:

> *"Alignment will not happen if we don't align our goals. Marketing focus on meeting their own KPIs, which don't always focus on lead quality. We need to make sure we meet our sales quotas, which requires high quality leads not necessarily a high quantity, but that isn't reflected in the KPIs of marketing."* (SAL2)

A consistent information exchange platform is lacking

Another recurring issue mentioned in the interviews was the lack of structure to exchange information in between marketing and sales departments. Six participants stated that they are missing an exchange platform such as regular meetings, to discuss daily issues or more strategic aspects. One participant said that the lack of structure is leading to ad hoc solutions:

> *"In order for us to be aligned, we need to develop a structure to discuss what's going on. We have to move from ad hoc solutions to recurring meetings to discuss what we are working on and give each other feedback. This would eliminate the need for ad hoc solutions."* (MAR5)

Another interviewee described how the information between sales and marketing was often shared through informal communication:

> *"I think we need to think of a better structure to exchange information with each other. I get to know most of the news from sales in front of the coffee machine."* (MAR2)

Another participant emphasized the need for regular meetings to increase sales and marketing collaboration:

> *"As much as I hate meetings, I have to accept I think both sales and marketing can benefit from sitting in a meeting room on a regular basis and discussing their agendas. We have to work closely together and be informed about what is happening on the other side of the funnel."* (SAL1)

4.1.3 Systems

The third section of the interviews investigated current data capabilities and additional systems needed to improve demand generation as well as the expected challenges when implementing the new systems. The key points extracted from the interviews have been grouped into two main categories. The first category involves systems limitations, specifically referring to slow engagement with new leads, insufficient insights and knowledge into the customer journey, inaccurate measurements of campaign performance and missing personalization and targeting capabilities. The second category of issues dealt with the adoption issues. These issues refer to the fear of losing control and potential resistance to the implementation because of not being involved in the system selection process.

System Limitations

System limitations referred to the lack of system capabilities to meet the needs of the organization, such as facilitating timely interactions with the leads, providing deeper insights into the customer journey and enabling personalization and targeting capabilities. System capabilities are important not only for the efficiency of operating L2RM but also for leveraging the data by developing greater knowledge about the sales funnel (Wizdo and O'Neill, 2014a).

Engagement with new leads is slow via current system

Most participants indicated that the current systems do not allow a quick response to lead actions. Eight participants have identified the inability to contact leads in a timely manner as suboptimal. One participant stated that lack of technology is impeding engagement with leads in an appropriate speed:

> *"I think speed in contacting prospects is really important. Right now, we have to look into many systems to gather the little information we have and then reach out. It's the only way we currently have, but it takes a lot of time."* (SAL4)

Similarly, another interviewee stated that the lack of speed of engagement was creating obstacles when contacting leads:

> *"It happens often that when I reach out to a lead, they are very surprised to hear from us. They tell me that it has been many days, often weeks since they looked at anything related to us. At that point that lead is no longer hot and we have missed our chance to contact that person at the right moment. [...] In sales, timing is everything. I want to be informed when my leads are hottest. We have to be faster in reaching out to leads."* (SAL2)

Available customer journey insights are not sufficient

Additionally, several interviewees stated that there was very limited intelligence available about the customer journey and this information was spread over different systems and difficult to reach. Six interviewees stated that they need better systems to obtain insights into the customer journey. One participant stated that the current systems were unable to provide sufficient insight into the customer journey and expressed the need for tackling this problem:

> *"We say we know our prospects and clients but we don't really know much about the customer journey. We have different types of prospects and I don't mean different companies, but people from different functions within a company. An IT guy has a different journey than a marketing guy. But we don't really know how these different prospects make their decisions and how we can be more convincing. [...] If we had more insights, we could approach our prospects so much better, but it is very difficult to get this information [via the current tools], if at all possible in some cases. We need this information to be easily available to everyone in the team and even in the whole company."* (MAR5)

Another participant stated that the current strategy of the organization was missing an effective approach to address the needs of the prospects:

> *"I don't think that we really know what our prospects want or need. We need to understand what do they really want, not what we want them to want. One of our most common mistakes is to try to sell what we have, instead of understanding the prospects and providing them a solution to their problem. We cannot approach our marketing and sales as selling only a product anymore. We need to embrace the idea that we are selling a solution and what that solution is, should match the insights we get from the market. [...] Our technology should be able to help us to easily gather market insights and learn from them. This should guide our communication strategy, our demand generation processes and our product road map."* (MAR1)

Personalization and targeting capabilities are lacking

Furthermore, several interviewees emphasized the lack of personalization and targeting capabilities in current systems. Six interviewees expressed that they need new systems to be able to effectively personalize the communications strategy and target the right audience. One participant identified that implementing a marketing automation tool could help solving this problem:

"There are quite a bit of tools available to us. We have an analytics tool, email marketing tools, social tools, CRM and so forth. But there is that middle, that part that is connecting all of those together, which is marketing automation and that is currently missing, which is a really important part. [...] It is so important for us to be relevant to our audience, communicate them the right information at the right time, but this cannot be effectively achieved manually. We have to automate this." (MAR1)

Another participant emphasized the need of personalization and targeting capabilities to create effective campaigns and measure campaign results:

"We have a lot of tools, but we don't have something that helps us to personalize our content or target our audience. We need a tool that leverages all the information about our customers and allows us to create effective campaigns and measure results of our campaigns." (MAR3)

Adoption Issues

Adoption issues entailed potential resistance to the new systems due to fears, scepticism and lack of involvement. Adoption of the new systems is a prerequisite for the execution of L2RM, as resistance may hinder the operations and impede leveraging the benefits provided by the new systems (Boulding et al., 2005; Perna and Baraldi, 2014).

Fear of losing control is creating scepticism

While the need for implementing new systems is commonly agreed on by the participants and interviewees frequently expressed the potential benefits, the replies from interviewees also showed a certain degree of concern about the changes that the implementation of new systems could bring. Six participants voiced concerns about losing control of their activities due to automation. One interviewee referred to losing control over the leads:

"I know that several people here are a bit insecure about implementing a new marketing automation tool, which seems to have an influence not only on marketing,

but also on sales. What they fear is that they will lose control over their leads and they won't be able to decide what they want to do with each lead. It will make things more rigid." (SAL1)

Another participant voiced concerns about managing the marketing automation system and dealing with any system problems:

> *"My concern is that a marketing automation tool will basically decide on the major marketing touchpoints. It is more efficient of course, compared to how we do this now. But what if something goes wrong and everything gets messed up. What am I supposed to do then? Now I know exactly what is going on and I can change things easily when I need to [...] and if I make a mistake somewhere I know what went wrong and how to fix it."* (MAR6)

Not being involved in selection may lead to resistance

Another issue stated by four participants was the potential resistance to the implementation of a new system due to the lack of involvement on users in the selection process. One participant stated that not involving the future users of the system in the selection process might impede the adoption of it:

> *"[...] if the users of a new tool are not involved in the selection of it, it could make the adoption a bit more difficult. The users might resist it and the implementation might just take longer. Maybe people also end up not using the tool."* (MAR5)

Another participant stated that some members of the organization have resisted to a new system previously and involving them in the selection process may help to reduce resistance:

> *"I saw in the past, that some tools we implemented were never used by all the users. We have a few cases, where we implemented a new system, but some people kept on using the old system, because some people did not want the new one. We still*

keep both tools, some use the new one, some use the old one. This is really ridiculous because a new software was bought for a specific purpose, but people are not using it. And we have to pay for them both. [...] But involving people who will use it when deciding on the new tool, could reduce such situations." (SAL2)

4.1.4 Organization

The last section of the interviews focused on the organization building block. The questions investigated the participant's view of potential obstacles to change within the organization as a whole, the alignment of departmental goals and the necessary changes to achieve a result driven organization. The responses revealed two major categories of issues. The first category involves interdepartmental issues, which refer to insufficient alignment of departmental goals, as well as unclear ownership of departmental responsibilities. The second category of organization issues are cultural issues, which entail the absence of a strong result driven mindset, informal organizational culture leading to inefficiencies and insecurity created by the increase in visibility of performance.

Interdepartmental Issues

Interdepartmental issues referred to the goals, which are not aligned between departments, as well as a lack of clarity in ownership of departmental responsibilities. Issues within this category are related to misalignments in strategies throughout the whole organization. Implementing a result driven strategy requires different departments in the company to work towards a united direction, which requires common goals (Wizdo and O'Neill, 2014b).

Departmental goals are unclear and unaligned

The interviews revealed that departmental goals are perceived to be neither clearly defined nor properly aligned throughout the entire organization. Ten participants stated that they did not think the departments in the organization work towards common goals. One participant expressed that the lack of common goals was resulting in suboptimal performance:

> *"I cannot think of any two departments in here that have perfectly aligned goals. Everyone only worries about their own things. When there are problems, everyone tends to blame the other side. This kills so many opportunities to work together and our results suffer."* (SAL2)

Another participant emphasized the need for common goals to improve the overall information exchange and create clear responsibilities:

> *"I would like to work more closely with other departments to get more input from them for our financial reports. What they do has a big influence on finance and receiving some hard numbers from them would make my life easier. But there is no one in charge of it and nobody wants to work on it. I need to make so many assumptions on their behalf, even though they should be able to provide that information. [...] We should have some common goals as a company. If we did, I think everyone would have to think about their departmental roles based on the common goals."* (OTH1)

Ownership of departmental responsibilities is unclear

Another frequently mentioned issue stated by six participants was unclear ownership of departmental responsibilities. A participant expressed frustration about finding the right person responsible for a specific area:

> *"I think that everyone in this company knows their area well within their own department. But whenever I need something from someone in another department, I am totally lost. I don't know who is the person in charge. Sometimes nobody seems to know whose responsibility it is."* (SAL5)

Another participant identified that tasks which did not have a clearly assigned owner pose a risk for the organization, as they get ignored:

> *"It seems to me that sometimes the responsibilities of each department aren't clearly defined or at least the teams aren't fully aware of it. When I send a request to a team often no one picks it up. I have to chase them and get things done after a lot of hassle. This is not just annoying for me, but it also means that important things get delayed or even sometimes totally ignored."* (OTH2)

Cultural Issues

Cultural issues entailed problems such as a low level of focus on results, inefficiencies resulting from a very informal company culture and insecurity created by the increased visibility of performance through the change process. As developing a result focused mindset is the core of L2RM (Wizdo, 2015), cultural aspects carry an important role in the success of this project.

The company mindset is not highly result driven

Based on the interview results, the general perception of the participants indicated a lack of result driven approach. Ten participants stated that the company was not driven with results in mind. A participant identified the overall lack of focus on activities that generate value to the company:

> *"I don't think that most of the people in our company are focusing on the results as a whole. I mean, they of course focus on results for their own internal metrics, but most people, even the managers don't really have an outlook on the company results, looking at what will really bring success to the company. I think departmental metrics don't always reflect the company results. Some metrics are even contradicting with each other. It is naive to assume that we are getting the best results we can."* (OTH1)

Another interviewee emphasized the importance of having the right mindset, in order to have a result driven approach:

> *"We could be a lot more result driven, but it is just a lot simpler to focus on the very next step. [...] if we focus on the results in everything we do, we would be more successful for sure. But the team needs to change the way they think and be strict on setting goals for every action and evaluate the outcomes to measure results. We don't measure our results very frequently because it takes time and effort. The team needs to recognize the importance of being result driven."* (MAR6)

Informal organizational culture leads to inefficiencies

Interviews also indicated that the informal organizational culture is leading to inefficiencies in outcomes. Eight participants stated that the high level of informality in the company is leading to suboptimal results. A participant mentioned the informal ways of communication as a problem:

> *"We all love the culture here. How people are not just colleagues but also friends or even more than that, a family. But to be fair, things don't always work very smoothly. A lot of work discussions happen during a casual chat or when having a cup of coffee, but not a lot in general, in meetings. I think that with this approach, half of the information gets lost in translation or gets forgotten."* (MAR5)

Another participant stated that the informal relationships between the people in the company led to low productivity in meetings and difficulty in decision-making:

> *"Because we are so informal, people often think anything goes. Many come ill prepared to meetings or show up late. Then we need another meeting about the same topic because we cannot get things done. [...] Because it is so informal, everyone states their opinions freely. I don't say this is a bad thing. Actually, it's great. But often there are too many chefs in the kitchen and it takes forever to finally agree on something."* (SAL1)

One participant stated that the informality within the company resulted in lack of diligence and dedication:

> *"Our culture sometimes makes it difficult to get things done. We tend to mix work and fun, which is amazing because this makes our work a lot more fun and easy. If something goes wrong, we joke about it over drinks. This also means if a task is unpleasant, [...] people tend to ignore it or push it to a future time. The reality of business is not always fun."* (OTH2)

Increased visibility of performance is creating insecurity

The interviews also revealed that the transparent performance measures create insecurity among some of the participants. Four interviewees voiced concerns about increased visibility. One of them expressed concerns about visibility leading to avoiding mistakes at all costs:

> *"Some people might be insecure about transparent performance measures. All the changes are supposed to increase visibility of the company performance, but for staff this also means that their individual performance is visible to the rest. Nobody wants to look bad. Sometimes we have to try new strategies and some of them fail. It's important that the visibility doesn't mean avoid mistakes at all costs."* (MAR6)

Another interviewee voiced concerns about the increased visibility and clear performance measures:

> *"I know there are some mixed feelings about concrete performance measures. We need to measure our company performance and what contributes to results to get to the next level. But hard facts are scary to many people, especially to those who are not used to numerical KPIs."* (MAR1)

After completing the interviews and identifying the most prevalent issues in the responses of the participants, a group of 6 participants has been invited to take part in the biweekly learning sets. The results from the learning set stage are discussed in the next section.

4.2 Learning Set Stage

The issues identified from the interviews built the basis for the learning sets, in which each issue was addressed in learning sets dedicated to each building block, following the action learning cycles (Coghlan and Brannick, 2010): plan, act, observe and reflect. My research journal was used as an aid for observations and reflections during the action learning cycles and provided an overarching resource for data analysis and reporting of results. Table 4 presents an overview of the issues identified during the interviews and the corresponding action items agreed upon by the learning set.

The subsequent sections of this chapter provide a summary of the five action learning cycles of this research and their stages: plan, act, observe and reflect.

PROCESSES		Actions
Structure Issues	Marketing and sales processes are not clearly defined	End to end process map creation
	Role division in sales funnel is rapidly changing	End to end process map creation
Alignment Issues	Mutual knowledge of processes is lacking	Information Session: L2RM for all stakeholders
	Sales and marketing processes are not transparent	End to end process map creation
	Feedback system for performance measures is lacking	Implementation of the end to end processes
SYSTEMS		
System Limitations	Engagement with new leads is slow via current system	Implementation of marketing automation tool
	Available customer journey insights are not sufficient	Implementation of marketing automation tool
	Personalization and targeting capabilities are lacking	Implementation of marketing automation tool
Adoption Issues	Fear of losing control is creating scepticism	Open communication to stakeholders
	Not being involved in selection may lead to resistance	Participative marketing automation selection process
PEOPLE		
Skill Limitations	Analytical skills in marketing need improvement	Training: Analytical and inbound marketing skills
	Marketing and sales do not have a data driven approach	Training: Analytical and inbound marketing skills
	Inbound marketing skills need improvement	Training: Analytical and inbound marketing skills
Collaboration Issues	Collaboration of marketing and sales is insufficient	Implementation of sales and marketing alignment meeting
	A consistent information exchange platform is lacking	Implementation of sales and marketing alignment meeting
ORGANIZATION		
Interdepartmental Issues	Departmental goals are unclear and unaligned	KPIs overarching marketing and sales departments defined
	Ownership of departmental responsibilities is unclear	KPIs overarching marketing and sales departments defined
Cultural Issues	The company mindset is not highly result driven	Implementation of result driven mindset
	Informal organizational culture leads to inefficiencies	Implementation of result driven mindset
	Increased visibility of performance is creating insecurity	KPIs overarching marketing and sales departments defined

Table 4: Action Items per Issue

4.2.1 Action Learning Cycle 1: Launch Plan

The first action learning cycle focused on creating a launch plan and making the initial preparations for the change project. The stages of action learning cycle 1 are described in this section.

Cycle 1 - Plan

I analysed the interview results and created the overall agenda for the first learning set meeting in preparation for the first action learning cycle. In the first learning set meeting, I provided an overview of the objectives of the learning set as well as the action learning cycles and offered a comprehensive overview of the most prevalent issues identified in the interviews. An example of the materials used is available in Appendix H. After reviewing the issues the organization was facing, the learning set members reflected on the interview results. Even though the learning set members overall agreed on the issues identified from the interviews, there were some topics where opinions diverged. Transparency of sales and marketing processes was cause for discussion between members from the marketing and sales departments, similar to the findings in the interviews. A similar discussion started around the topic of collaboration between the marketing and sales departments, which triggered heated discussions between learning set members.

> *Reflective Pause 1: I realized that my opinions tended to align much closer with the views expressed by marketing team members, rather than the sales team members. Am I really being objective?*

During these discussions, I had to direct attention back at trying to understand the reasons for the problems by asking question rather than following assumptions and jumping to conclusions.

After reflecting on the issues identified in the interviews, the learning set moved on to creating a launch plan for the implementation of L2RM. One of the core components of the launch plan was to decide on the overall agendas for the following learning set meetings.

The group decided that one full learning set meeting should be dedicated for each building block: processes, people, systems and organization. After the meetings for all four building blocks, a final learning set meeting was planned to serve as opportunity to reflect about the overall development and achievements up to that point. The learning set identified an important aspect in the sequence of the building blocks. Rather than following the order in the conceptual framework of the research, the learning set members decided to work on the systems building block prior to the people building block. The learning set identified that the decisions and actions taken in the systems building block may have an effect on the people building block, since skill gaps in the people building block may be dependent on the actions taken in systems building block. The learning set agenda is presented in Table 5.

	THEME	AGENDA
LS1	Launch Plan	Create the L2RM launch plan and schedule the initial preparations
LS2	Processes	Create an aligned L2RM process map and plan the implementation
LS3	Systems	Plan the technology selection criteria, timeline and implementation
LS4	People	Plan training and recruitment proposals to fill the skill gaps
LS5	Organization	Plan the transformation towards a result driven organization
LS6	Final Reflection	Review the current situation and decide on the next steps

Table 5: Learning Set Themes and Agendas

After the sequence of learning set meetings was agreed, the learning set moved on to decide on action items in preparation for the project. The first action item agreed upon was to have an information and question and answer session on L2RM for the members of the organization that are affected by this change. This session aimed to provide an overview of the concept of L2RM, the scope of the change and the collaborative decision-making approach, as well as to answer the questions of the stakeholders involved. The second action item agreed upon was to get the buy-in from the stakeholders affected by the L2RM implementation through the engagement of the learning set members as change agents. Learning set members agreed to be the point of contact for any questions and concerns, highlighting the benefits of change and motivate their teams for the upcoming change, while encouraging feedback throughout the whole project. The third action item identified by the learning set members was to outline the existing marketing and sales processes jointly with their teams. Two separate meetings were scheduled by the learning set to outline the marketing processes together with the marketing team and the sales processes together with the sales teams. It was decided that the results would be discussed in the next learning set meeting, which focused on the processes building block.

Cycle 1 - Act

The actions from the first learning set meeting were executed as planned. The information session and the question and answer session on L2RM was attended by most of the members of the organization affected by the implementation of L2RM. The information session offered an overview to familiarize the teams with the relevant concepts and answered their questions about the change. To get the buy-in from their teams, learning set members used open communication to promote and discuss the benefits of L2RM. In addition, the teams were encouraged by the learning set members and me to provide feedback on the change efforts and to discuss any concerns they had. The third action item agreed upon in the planning stage was to outline the existing sales and marketing processes. Both sales and marketing teams had internal meetings to outline their processes and drafted the old processes. Moreover, teams discovered the gaps in the processes and defined new items that follow a clear logic.

Cycle 1 - Observe

During the information session on L2RM, the learning set members and I observed mixed reactions from the participants. While some members of the organization showed enthusiasm towards L2RM and focused on the benefits, others were more reserved in their reactions. However, the session was perceived as successful by the learning set members. The feedback we received showed that the audience appreciated the detail of information shared about the plans. A participant stated that:

> *"I am happy that we are being informed about what will happen. Even though I might not fully agree with it, being involved makes me feel appreciated." (*SAL5)

Many questions were asked during the information session and the answers provided seemed to have satisfied the audience. A very favourable aspect about this information session was the involvement of the top management, who showed their enthusiasm and support towards the implementation of L2RM. However, the meetings to outline the processes did not move equally smooth. The teams saw drafting the processes as a tedious task and it was visible that the teams were not used to thinking of their activities in terms of processes. The marketing team had to schedule an additional meeting to finalize their process outline, as the initially planned duration was not sufficient to settle all discussions and finalize their process map. Although sales teams managed to finalize their process map within the allocated time, there were many arguments over certain steps. However, once the teams started to write down the process steps, they soon realized the benefits of this action. Having the processes visually outlined reduced confusion within the teams, as participants realized that in some cases members of the same team had very different understandings about the same tasks.

Cycle 1 - Reflect

The second learning set meeting took place and the members met to reflect on the actions from the first action learning cycle and subsequently plan the actions of the next cycle. Participants from the learning sets presented the actions taken and discussed their reflections on the outcomes. The high number of questions asked by the members of the organization during and after the information session was perceived as highly productive by the learning set members. Not only was this a sign of interest, but it also created the opportunity to address the concerns early on. Next, learning set members commented on the level of buy-in received so far. They concluded that as their teams were involved early on in this change, there was more willingness to embrace the change. A learning set member stated that:

> *"I have seen at least with my team that they were glad to be invited to be a part of bigger decisions. Several of them already told me that they are positive and on board with the plan so far."* (MAR1)

The learning set members also reflected on the task of outlining the processes with their teams. While most of the learning set members agreed that this was a much harder task than initially anticipated, some of the learning set members also stated that they were surprised by the contradictions and the level of misinformation within their teams. The learning set members also stated that once the processes were clearly outlined, the teams were very satisfied with the outcomes and expressed their appreciation for being hands on involved in this change project. All learning set members agreed that this task was extremely helpful for them and for their teams. One learning set member critically stated that:

> *"We should have done this long time ago, but there was always something else that got priority and in retrospect defining processes should have been a high priority all along."* (SAL2)

4.2.2 Action Learning Cycle 2: Processes

The second action learning cycle focused on addressing the issues in processes building block. The stages of action learning cycle 2 are described in this section.

Cycle 2 - Plan

During the first action learning cycle, the learning set members decided to define internal processes within marketing and sales departments. Each team created internal process maps, which served as basis for creating the full L2RM process map in the second action learning cycle. The members from the learning set realized the importance of educating the employees and involving them from an early point onward. The group decided to continue open and early communication with their teams and stakeholders. After the reflections, the learning set started the next action learning cycle by planning the actions for the second cycle. The learning set members combined the process maps that were created by their teams, defined the necessary cross departmental transactions and created an end to end L2RM process map. A high-level process map is available in Appendix I. As the processes were already outlined on both the marketing and the sales sides, creating an end to end process map by combining the sales and marketing processes was thought to be an easy task. However, this was proven to be wrong as there were strong conflicts between the learning set members from sales and marketing regarding the transactional steps in the processes. The main conflict was regarding the point where the responsibility of marketing ends and the responsibility of sales starts, similar to the findings of the interviews. After lengthy discussions, the learning set agreed that the role of marketing needs to expand as this was necessary to serve the common goals and drive revenue.

> *Reflective Pause 2: I asked for objective views from the learning set members of other departments to help settle the arguments and bringing in more objective views to the table. This seemed to resolve the conflicts and satisfied both sales and marketing sides.*

After the process map was agreed on, the learning set members decided to schedule a presentation to explain the end to end L2RM processes to all stakeholders and to make sure that everyone involved is informed about the end to end processes rather than knowing only their own functions. The next action item agreed upon was to plan the implementation of the processes in each team. The goal was to start following the mapped processes as much as possible without delay and, at the same time, to uncover inefficiencies the current technology poses to following the defined end to end L2RM processes.

Cycle 2 - Act

The presentation of the end to end L2RM processes took place after the learning set meeting, where the new process was presented to all stakeholders. Learning set members ensured that all team members understood the processes and that all their questions were answered. Subsequently, the learning set members started implementing the L2RM processes and asked their teams to follow them as much as possible. I encouraged the participants to be critical and communicate any unexpected problems to the learning set members. The reactions from the employees were mixed. While some participants were enthusiastic about the new process, some participants stated their concerns, due to the limitations of current systems. However, one of the main goals of this action item was identifying the current restrictions and system gaps to fully follow the process. The feedback gathered from the inefficiencies in the new end to end processes provided to be highly valuable to understand the gaps in systems and identify the additional technology needed to close these gaps. Additionally, this step served as a learning opportunity to start working towards a result driven approach, where all stakeholders started to understand their role within the full magnitude of the organizational goals.

Cycle 2 - Observe

During the planning of the end to end L2RM processes, the members of the learning set were very passionate and showed strong ownership of their roles in the process. Planning the cross departmental processes led to intense discussions between the learning set members, particularly between the members from sales and marketing. Even though some of the discussions were heated, they were productive and the learning set came to an agreement that satisfied all members.

> *Reflective Pause 3: A heated discussion was between a junior member and the most senior member of the learning set. Seniority difference almost didn't seem to exist since the learning set members have openly discussed their opinions as equals. This implies very low hierarchy in the company.*

Although the learning set session overran the allocated duration, participants were willing to stay longer and continue the meeting until an agreement was reached. After the learning set meeting, the presentation of end to end L2RM processes to the sales and marketing teams also led to some arguments between marketing and sales team members. However, as the learning set had already discussed similar points, these discussions were resolved with ease and teams stated that they were content with the end to end L2RM processes. Even though such a holistic approach proved to be a challenge for me in terms of coordination and adhering to timelines, the learning and collaboration effects outweighed the challenges. The informal conversations between team members and I, but also between learning set members and their team members, revealed that teams were satisfied with the organizational change efforts. Multiple stakeholders stated that they felt their opinions mattered and were taken into consideration. A member from the marketing team stated that:

> *"This is the first time where I feel like we are working as equals and our opinions have the same weight."* (MAR5)

Cycle 2 - Reflect

The learning set members met again to reflect on the actions from the second action learning cycle and to plan the next action steps. Learning set members stated that the end to end L2RM processes were perceived well by their teams and most team members seemed to be committed to the implementation. However, one learning set member stated that they received several sceptical comments and questions from members of the sales team regarding the cross departmental processes, which indicated a distrust towards the marketing team. The increased responsibility of the marketing department in the new process caused concerns over its effects on the sales department. One learning set member said that:

> *"I still hear about some people not being happy with the increased responsibility of marketing, but I think that is because they don't fully understand yet why it has to happen. I have been asked 'Who made marketing the boss'. We can't afford to ignore scepticism."* (SAL1)

The learning set decided to tackle these issues in the people building block. Despite the scepticism, the learning set members were overall satisfied with the outcomes of the actions taken. The learning set members emphasized that the active involvement of their teams in this change initiative has acted as a catalyst for their teams' motivation and provided a learning opportunity for the people involve. The learning set members also stated that there was a consensus that the new end to end L2RM processes were clear and easy to understand. However, the teams needed more time to be fully proficient in the new processes. Despite an initial mild resistance, the learning set members were confident that the new processes would be adopted by all stakeholders. Implementing the new processes also revealed that the old systems were not suitable for the new end to end L2RM processes, as they required substantial manual work. The learning set acknowledged that a marketing automation tool is necessary to enable the automation of multiple process steps and increase the efficiency, which confirmed the findings from the interviews. With these insights, the learning set could progress to the planning stage of the next cycle, considering the system selection as a collaborative process to reduce resistance.

4.2.3 Action Learning Cycle 3: Systems

The third action learning cycle focused on addressing the problems identified in the systems building block. The stages of action learning cycle 3 are described in this section.

Cycle 3 - Plan

Following the reflections of the second action learning cycle, the learning set members moved on to planning the action items for the next cycle. Implementation of the new L2RM processes in action learning cycle 2 revealed that the existing systems were not sufficiently capable to execute L2RM processes efficiently. Therefore, the learning set concluded that a marketing automation system was urgently needed. The learning set created a timeline for the implementation of the marketing automation system and decided on the evaluation criteria: system capabilities, speed of the implementation, ease of use and total cost of ownership. The learning set members decided on selection of a three-person cross-functional systems team, responsible for creating a shortlist of marketing automation tools, taking part in the demos of each tool in the list, evaluating the tools and presenting their recommendations. A copy of the marketing automation tool evaluation sheet is available in Appendix J. Based on the requirements identified in the learning set meeting, the learning set decided that the cross-functional systems team would be responsible for evaluating the demos with suitable software providers and holding a meeting with sales and marketing teams after the demos took place. The goals of that meeting were to present the cross-functional team's evaluation of each tool based on the identified criteria and to collaboratively decide on the marketing automation tool. The most tech savvy members of the marketing and sales teams, as well as a member of the IT team were selected to take part in this team. The learning set also decided to address the potential fears of losing control among some of the employees resulting from the automation of several process steps. They assured the teams that this implementation is a chance to improve individual and company performance rather than reducing the control of the employees. Another action item that was planned by the learning set members was to identify the skill gaps in marketing and sales teams to efficiently use the new systems and follow the new L2RM processes, which confirmed the findings from the interviews.

Cycle 3 - Act

The first action item undertaken was to discuss participation in the cross-functional systems team with the selected team members, who were enthusiastic about being chosen and added further details to the requirements criteria. Next, the team made a shortlist and scheduled demos with marketing automation providers. After the demos took place, the cross-functional systems team evaluated the systems and presented their opinions and recommendations to the sales and marketing teams. After the presentation, the team members discussed their views and they decided on a clear winner that satisfied all selection criteria. A copy of the marketing automation tool evaluation sheet is available in Appendix J. Subsequently, the IT department initiated the implementation of the new system. The teams also discussed the necessary skills to use the new system in order to support the new processes and concluded that there was need for additional data skills and inbound marketing skills in the marketing team, which confirmed the interview findings. The team concluded that the strength of the team members was mainly in the communications aspects of marketing. However, the marketing team needed to improve their analytical and technical skills. Additionally, the learning set members used open communication to reaffirm the benefits of the implementation and at the same time provide each member the opportunity to discuss any fears about the upcoming changes.

Cycle 3 - Observe

During the third action learning cycle, I observed that the learning set members worked in greater harmony than before and showed greater interest in understanding the views of their counterparts by asking insightful questions.

> *Reflective Pause 4: Everyone seemed to be more critical and reflective over their own opinions, including me. I would have never involved this many people into marketing automation selection. I was scared this would turn into chaos but to my surprise everything went quite smoothly.*

Collaborative decision-making created a very supportive and motivating atmosphere, which was confirmed by observations from the learning set members. One of the learning set members stated that:

> *"This was a real win-win for everyone. It's so surprising to see how enthusiastic some of the sales guys are for the new marketing automation tool. Everyone seems to take this very seriously."* (MAR2)

The cross-functional systems team in particular enjoyed the opportunity to provide the base work for an important decision in this change project. The cross-functional systems team told me that they worked well together. Similarly, members from the sales and marketing teams appeared to be appreciative to be a part of the marketing automation system selection, which was also evident in the interview findings. The teams also discussed the skill gaps needed to use the new systems and to follow the new processes. They quickly came to the agreement that there is a need for analytical and inbound marketing skills, which also confirmed the interview findings. Although this realization seemed to cause some concern and insecurity among the team members, they commonly agreed that these skills were necessary. Especially some members of the marketing department, who have to work with the new system, were concerned about the additional skills needed, although the learning set members assured them that training was going to be provided. One marketing member stated that:

"It is a bit intimidating, not just a new system but us as marketing having to work with more numbers and data. But it is for the best if we want to stay ahead in the game." (MAR6)

On the other hand, some team members showed their enthusiasm and excitement for learning new skills and using a new system.

Reflective Pause 5: I have seen that the junior employees were more excited and enthusiastic, while the senior employees were more concerned and insecure. This could be a sign of potential adoption issues from senior members.

Cycle 3 - Reflect

After the action stage of the third action learning cycle was completed, the learning set members met to reflect on the actions taken and plan the next action items. The learning set members were satisfied with the results of system selection and expressed their enthusiasm about the approach employed in the selection process. One participant stated that this collaborative selection approach was particularly helpful to eliminate resistance to adopting a new system as each team member felt like they made the decision. Several learning set members also shared feedback from their teams, describing their overall satisfaction with involvement in the decision-making process. One learning set member said that:

"I think some people are truly proud to be a part of the decision-making. [A member of marketing team] … said that 'We definitely picked the best solution. I can't wait to see how it works in practice'." (MAR2)

The reflections on necessary skills for managing the new system revealed some interesting findings. One learning set member reported interest from members of the marketing team to improve their data analytic skills, with one person specifically asking approval to attend an evening course about data analytics offered by a professional education institution. This was an interesting outcome as it confirmed that the employees felt they were lacking certain skills, however, they were also willing to step up and acquire these skills, as they believed that these skills were necessary for them. The identified skill gaps about using the new system and following the process served as input for the planning stage of the next cycle, where the learning set planned action items to cover the skill gaps. The learning set also discovered that fear towards the change initiative was stronger in the marketing team than in the sales team due to the stronger change implications for the marketing team. One of the learning set members noted that making the benefits more tangible to a specific role was helpful in addressing the fears.

4.2.4 Action Learning Cycle 4: People

The fourth action learning cycle focused on addressing the problems involved in the people building block. The stages of action learning cycle 4 are described in this section.

Cycle 4 - Plan

Following the reflections from the third action learning cycle, the learning set moved on to plan the actions for the next cycle. The learning set discussed the existing gaps in analytical skills and inbound marketing skills that are necessary to efficiently work with the new processes and systems, as discovered in action learning cycle 3. The learning set identified the key skills needed for L2RM and evaluated if those skills could be covered through training existing team members or if new employees would have to be hired. In addition, training requirements for each skill were specified. The learning set concluded that it may be possible to train the team members in analytic and inbound marketing skills. However, opening one new role in the marketing team may help to improve the outcomes. It was decided by the learning set to plan the training together with the HR department and propose the new marketing role to top management for approval to initiate the recruitment process. The learning set also agreed to discuss the training possibilities with their teams and identify which team members were going to take part in the training. Additionally, the learning set members agreed to discuss and implement the regular sales and marketing alignment meetings to facilitate collaboration and open communication between teams and ensure the new L2RM processes are followed by both marketing and sales side. This action item also aimed to address the scepticism discussed during the second action learning cycle. The alignment meetings were designed as the stage to clarify the needs of sales and marketing teams and discover solutions that benefit all stakeholders.

Cycle 4 - Act

Learning set members met with their teams to discuss the training opportunities. Every single marketing team member stated they were interested in improving their analytic and inbound marketing skills and showed enthusiasm to attend the training sessions. Some members of the sales team and one person from top management also showed interest in attending the training. Together with two of the learning set members, I discussed the training requirements with the human resources department (HR). Due to the high level of interest from the employees, we agreed that the training would be offered company-wide and made available to all employees. In-house training sessions with specialized professional education institutes have been scheduled to take place over the upcoming months. Moreover, I presented the proposal for creating a new role in the marketing team to top management. Additionally, the learning set members scheduled weekly regional sales and marketing alignment meetings to enable communication and collaboration between the teams. The initial meetings took place the very next week. Team members discussed the weekly agenda items and decided on the reports that will be reviewed on a weekly basis.

Cycle 4 - Observe

The act stage of this cycle showed a high degree of interest and participation in this change initiative. Many of the questions asked were very specific, aiming to learn about the content to be taught in the training.

> *Reflective Pause 6: I was surprised to see that so many people were interested in training. I believe they saw value in this not only for the company but for themselves*

personally and were willing to go the extra mile because of that. The opportunity to learn and develop seems to be a very strong motivator.

Especially the junior employees showed considerably higher enthusiasm to learn new skills than the senior employees, which seemed to have infected the senior employees quickly. These observations were confirmed by learning set members. One of them said that:

> *"I sometimes admire the energy of these young guys, how willing they are to learn new stuff. Just by hearing their excitement about the new system I knew who is who. That is something we should encourage every day."* (OTH1)

The level of enthusiasm also seemed to be negatively correlated with the level of insecurity among the employees. Senior employees appeared to be more reserved about acquiring new skills at first. However, it was interesting to observe how the enthusiasm of junior members reflected on the senior members, creating a pleasant environment. Not only the members of the marketing team were interested in the training, but also some sales team members and even one of the top managers expressed interest in attending training to improve their data skills. This was a particularly exciting aspect.

> *Reflective Pause 7: The interest in gaining analytical skills seemed to be infectious. It's almost like no one wants to be left behind. This is such an interesting example of positive spill over effects within the company. I am wondering if the interest will continue or is this just a hype.*

The presentation of the new role requirements to top management was received well. They stated their agreement with the suggestions, however as expected no decision has yet been made, as approval for opening a new position typically takes several months in the organization.

Moreover, the regional sales and marketing alignment meetings initiated communication and collaboration efforts between sales and marketing team members. Some members of the sales and marketing teams were not in favour of a weekly meeting and expressed their concerns about having additional meetings that will take away their time. However, learning set members emphasized that the goal of the alignment meetings was not only to coordinate efforts, but also to identify potential failures and take corrective action. All regional alignment meetings went smoothly except for one, which led to intense discussions between marketing and sales team members. Nevertheless, it was interesting for me to observe that some of the participants displayed an inquisitive and reflective approach to resolving the disagreements, which was encouraged throughout this change project. At the end of the regional alignment meeting, teams acknowledged the benefits of the recurring alignment meetings.

Cycle 4 - Reflect

The learning set had their next meeting to reflect on the actions taken. The high demand for training in data analytics was surprising to the learning set members. They stated their confidence that the teams were willing to learn new skills and adopt a data driven approach. The observed enthusiasm about adopting a data driven approach was used in the next action learning cycle to plan shifting the entire organizational culture to being more result driven. Some of the learning set members repeatedly stated their surprise at how well the change initiative has been received so far, compared to prior change projects of similar magnitude. One of the learning set members said that:

> *"I was pretty certain this change would stir up trouble between marketing and sales. But luckily they seem to be getting on well with each other better than ever."* (OTH2)

The learning set concluded that the participative nature of how the project was planned played a major role in the openness towards the change. Some learning set members stated that factors contributing to the current change were the open communication with the stakeholders and setting clear expectations from the beginning. Lastly, the learning set members reflected on the events around the alignment meeting discussions. Even though most of the team members were in favour of having regular meetings, some were against it. The learning set members acknowledged that resistance was to be expected in any change. However, they also reflected on the effects of the existing buy-in among the organizational members affected by the change. The buy-in appeared to have increased since the first action learning cycle. Some of the learning set members stated that the members who showed the greatest level of support to the change initiative also influenced the opinions of their peers in favour of the change. The learning set members acting as change agents also helped to increase buy-in in the organization as the members were not only the managers but also the peers of the team members.

4.2.5 Action Learning Cycle 5: Organization

The last action learning cycle focused on addressing the problems involved in the organization building block. The stages of action learning cycle 5 are described in this section.

Cycle 5 - Plan

After the reflection stage, the learning set moved on to planning the actions for the final action learning cycle. The learning set members discussed a plan containing steps of how to increase the focus on results and align departmental goals. The learning set agreed that there was overall enthusiasm in the organization about adopting a data driven approach became evident in cycle 4 with high demand for analytical skill development. They saw this opening a gateway for shifting the entire organizational culture to being more result driven. In order to achieve a result driven mindset, the learning set agreed to define new metrics that are not purely internally focused but aimed to encourage common goals across departments. The need for this action was also evident in the interview findings. As both sales and marketing departments have a stake in revenue generation, the learning set agreed that performance of both sales and marketing was to be measured in terms of company revenue. The learning set decided that a revenue focused approach served as the basis to create departmental goals and individual KPIs. Managerial members of the learning set agreed to discuss the creation of new KPIs with their team members. As a final action step, the learning set decided to present recommendations that went beyond the scope and the authority of the learning set to top management.

Cycle 5 - Act

Following the planning stage, the managerial members of the learning set worked with their team members to create goals and KPIs overarching the marketing and sales departments to support the seamless integration between marketing and sales activities. Sharing departmental goals between marketing and sales was initially received with scepticism from some members of the marketing department. A member from the marketing department stated:

> *"I would rather like to be responsible for my own performance than depending on someone else's success."* (MAR5)

The idea that the success of marketing is measured by the success of sales was cause for tensions and insecurity. However, the learning set members emphasized that the success of both departments depends on the level of collaboration between each other and common goals are the only way to achieve this. The discussion about the individual KPIs of the team members turned out to be more complicated than initially anticipated, as it required modifying performance plans. Also, the involvement of the HR department was needed to progress with KPI adjustments, so the learning set decided to implement the new KPIs gradually. As a final step, I presented the organization-wide recommendations to top management. They are listed below:

- Departmental goals should be aligned throughout the whole organization and organization wide goals should be clearly defined and communicated to all employees to encourage a common direction.
- Cross departmental processes should be clarified between all departments that interact with each other and ownership should be clearly identified to eliminate inefficiencies and misunderstandings.
- A result driven mindset and performance measures should be promoted within all departments and functions and, if needed, employees should be trained.

- Collaborative decision-making with cross-functional teams and action learning techniques should be employed in future change efforts throughout the organization as it has proven to be highly successful in this change project.

The recommendations presented to top management were received with great appreciation. Top management agreed that defining common organizational goals was important, however, these goals should be moving targets rather than static goals. As a result, top management decided to create several milestones every quarter that focus on the most important targets for that period and communicate these to all employees in quarterly meetings.

> *Reflective Pause 8: Surprisingly, several top managers actively committed to align processes across departments and to create a result driven mindset. I see this as strong evidence that this project has been perceived as successful by top management.*

Moreover, the change management techniques employed in this project have been praised by top management and they agreed they should be used in future change efforts in the organization.

Cycle 5 - Observe

During the final action learning cycle, I observed that the learning set members were working visibly more collaboratively together to tackle the issues. As the learning set was discussing the alignment of marketing and sales goals in the fifth action learning cycle, the approach the learning set members adopted was very different compared to the approach they had during discussions on the transparency of marketing and sales processes in the first action learning cycle. Although the topics were essentially very similar and there were contradicting opinions, learning set members focused on mutual interests. Rather than approaching the problem as opponents that defend their territory, learning set members focused on understanding each other's opinions. The approach to problem solving became more constructive and critical with more insightful reflections. This observation was not only shared by me but also by learning set members themselves. One of them stated that:

> *"There is a big difference. Now we look for solutions together, earlier we were looking for problems together."* (SAL1)

Some learning set members identified their own biases and assumptions which they were not aware of and adopted a more objective approach. This approach also seemed to be infectious, as not only the learning set members but also other team members showed a more collaborative and reflective approach.

> *Reflective Pause 9: Using an action learning approach seemed to have triggered a larger scale learning effect. Not only did the learning set members learn directly, but also other members of the organization learned indirectly from this research. For me, the biggest learning was through my researcher and practitioner roles that enabled me to have a different objective perspective on my organization and my own role.*

Cycle 5 - Reflect

The learning set met for a final session to reflect on the actions taken and discuss the current state of the change. The learning set members stated that collaboration between marketing and sales departments has been successfully improving. Although the focus on revenue has been questioned by some team members, mutual responsibility was commonly accepted by the teams as the driver for mutual success. The learning set members also reflected on the strong support from top management and were confident that the implementation of L2RM may bring improvements to the entire organization. The praise from top management and the encouragement to use a learning set approach left the learning set members with excitement for future change initiatives. Additionally, each member of the learning set reflected on their learning during the change project. Several participants stated that self-criticism was an important takeaway to problem resolution together with the approach to ask questions in order to understand the concerns of others instead of jumping to conclusions. One of the learning set members said:

> *"I feel like we discovered so much common ground that we didn't know existed."* (MAR1)

Also, empowering and involving the employees in the change efforts from an early point on was seen as a powerful method of creating excitement for the change initiative and reducing resistance. Learning set members also reflected on the action learning approach of this project and noted that the collaborative approach not only provided a learning opportunity for them and their teams, but also provided a collaborative way of working for their teams. Finally, several learning set members mentioned that despite the increased need for coordination, collaborative decision-making has the potential to arrive at solutions that are better for the organization and gain wider support as more people are involved in the process. To conclude the learning set meeting, the members scheduled follow up sessions with the goal of evaluating and monitoring the change process in the following months.

4.3 Concluding Words

This chapter offered a narrative account of the data collection stage and the findings. The interview stage of this research identified several issues within each of the four building blocks with the aid of thematic analyses of the interview data. This research identified structure issues and alignment issues in the processes building block, skill limitations and collaboration issues in the people building block, system limitations and adoption issues in the systems building block and lastly, interdepartmental issues and cultural issues in the organization building block.

The identified issues were addressed by a learning set composed of six members of the organization via five action learning cycles. The learning set followed the plan, act, observe and reflect cycles of action learning as they worked on the issues in each building block. The action learning cycles resulted in: a clearly defined L2RM process map from campaign level to revenue; selection and implementation of a new marketing automation tool; training and recruitment initiatives as well as alignment meetings for sales and marketing teams; and recommendations for the organization to become more result driven. In addition, increased reflexivity among the learning set members and an overall organization-wide learning effect has been observed.

The findings of this research include ideas both that are general for change initiatives in different organizational settings as well as specific findings for this project. Findings such as the creation of a process map, practicing open communication, the implementation of a new systems or developing KPIs overarching more than one department may apply to other change initiatives. However, many findings from this research were specific to the implementation of L2RM in the specific setting of the researched organization and may not be generalizable.

The changing roles of marketing and sales required a redesign of the marketing and sales processes, which was more extensive than most change initiatives. The changing roles of marketing and sales departments in the researched organization required a substantial redesign of the end to end marketing and sales processes to better meet the changing customer demands, which was highly specific to this research project.

The decision to implement a marketing automation system and using a participative systems selection process involving both marketing and sales teams, as well as IT, was a key finding for this research and was critical for the L2RM implementation in this study. In order to assure that the most suitable system was selected based on the needs of the involved stakeholders and to increase buy in of the stakeholders, a participative decision making approach has been used, which may not be applicable to other organizational settings.

The specific setting of this research required the development of analytical and numerical skills to implement and execute L2RM successfully. Prior to the research, marketing department was lacking the skills to base decisions on data. This research found evidence that the staff was willing to acquire analytical and numerical skills as they recognized the potential of data based decision making.

Although the findings of this research in the organization building block may apply to different change projects, the informal organizational culture and flat organizational structure in the research organization posed a specific setting. The problems that were faced can be very different in other organizations of different structure and culture and should be considered based on the setting of the organization.

The findings from this chapter are discussed in the next chapter to provide answers to the research questions.

CHAPTER 5 - DISCUSSION

This chapter discusses the results for each building block of the conceptual framework. The discussion chapter is divided into two main parts where both research questions are answered from the perspective of each building block and the findings from the research are compared to the body of knowledge. The findings from the interviews enabled to identify success factors for the implementation of L2RM relevant to the researched organization and provided evidence for the first research question. The sessions with the learning sets provided the stage to identify suitable action items to work towards managing the success factors to implement L2RM and provided evidence for the second research question. The research journal served as overarching support with observations and reflections taken during both interview and learning set stages and supported the discussions for both research questions.

5.1 Research Question 1

The first research question of this thesis was “What are the success factors in terms of processes, people, systems and organization for implementing L2RM in the organization?”. This section discusses the findings from the interviews supported by the research journal, which focused on identifying the existing key issues in the organization presenting an obstacle for the implementation of L2RM. Identifying key factors for the successful implementation of L2RM in the organization was achieved by revealing problem areas within the company as well as finding approaches to address the revealed problems. The findings are discussed by building block below.

5.1.1 Processes

The processes building block was one of the four building blocks used for the implementation of L2RM in the organization. It entailed collaboration between the departments, the clarification of the sales funnel and performance measures to appropriately assess the contribution of marketing activities to revenue generation. I grouped issues in the processes building block into two categories: structure issues and alignment issues. Structure issues referred to the problems regarding inadequate clarity in marketing and sales processes, as well as a shift of roles in the sales funnel. Alignment issues entailed the scarce knowledge regarding the mutual processes between marketing and sales departments, the insufficiency in transparency into marketing and sales processes, as well as the insufficient exchange of feedback between both departments.

The findings of this research indicate that, in order to successfully implement L2RM in the organization, a key success factor is to create clarity in terms of processes between marketing and sales departments encompassing marketing activities, sales activities as well as the transaction stages between marketing and sales activities, thus removing the grey area causing inefficiencies and suboptimal results. Prior to this research, marketing and sales processes were not well defined in the organization, which caused inefficiencies between marketing and sales departments. Several of the interview participants stated that the ideal process between marketing and sales departments is clear and known to all stakeholders and that its implementation would enable smoother execution of the process. After the marketing and sales processes were defined, the end to end processes was mutually beneficial and enabled the marketing and sales teams to be more efficient and informed. This research supports the arguments of Wizdo (2015), who states that clearly defined marketing and sales processes are a necessity for optimal allocation of marketing resources. However, Kotler, Rackham and Krishnaswamy (2006) argue that it is not sufficient to clearly define the marketing and sales processes and propose two further steps to optimize the sales and marketing processes: alignment and integration. Although, through this research project, the organization has reached a moderate level of alignment. Therefore, understanding how to optimize process integration requires further research with a longer duration of data collection.

Additionally, the findings indicate that adjustments to responsibilities of marketing and sales functions within the sales funnel are necessary to address the changing customer behaviours resulting from the rapidly changing environment. Through actions taken in this research project, the organization was able to define and expand the scope of its marketing function in the sales funnel. Although awareness of the increasing scope of marketing due to changing customer behaviours was evident in the company, the sales and marketing departments were in conflict over where the responsibility of marketing ended and the responsibility of sales started. This observation supports the findings of Mintz and Currim (2013) as well as Järvinen and Karjaluoto (2016), who acknowledged the changing role of marketing in the sales cycles and recognized the expansion of marketing's responsibility deeper into the sales funnel.

Moreover, the findings also suggest that increasing the transparency between marketing and sales processes is a vital aspect of implementing L2RM. The marketing department interviewees saw poor information about sales activities taken with the leads they handed over as an obstacle, while the sales department interviewees presented lack of information about marketing interactions with leads before handover as problematic. This evidence supports the conflicts identified by Biemans, Brenčič and Malshe (2010) as well as Homburg, Jensen and Krohmer (2000), who state that sales departments tend to complain about the quality of the leads while marketing are dissatisfied with lead management and follow up strategies. Biemans, Brenčič and Malshe (2010) further argue that each company must develop its own marketing and sales configuration, most suitable to its environment. The desired level of transparency in my organization might not be achievable or necessary in other organizations due to the different needs of the market in different organizational environments and thus a unique approach suitable for the particular needs of an organization is necessary.

This research also indicates that the implementation of a feedback system to measure the performance of L2RM is critical for successful implementation. Several interviewees stated that the company was not able to measure the impact of marketing activities on demand generation and hence, on revenue generation. This result aligns with the arguments of Homburg, Artz and Wieseke (2012), who suggested that measuring the impact of the marketing activities could significantly improve the performance of the organization.

5.1.2 Systems

The systems building block was the second of the four building blocks used to research the implementation of L2RM in the company within the data and time period of this study. Systems entailed the technological aspect of choosing and implementing a suitable tool for the company, as well as potential resistance to new technology from the employees. I grouped the system issues into two categories: system limitations and adoption issues. System limitations refers to the lack of system capabilities to meet the needs of the organization, such as facilitating timely interactions with leads, providing deeper insights into the customer journey and enabling personalization and targeting capabilities. Adoption issues entailed potential resistance to the new systems due to fear, scepticism and lack of involvement.

The findings suggest that selection and usage of suitable technology is critical to the implementation of L2RM. The old systems in place hindered the company's ability to react quickly to leads who show interest through specific behaviours. In addition, good understanding of the customer journey is an important factor when implementing L2RM. Several interviewees noted that limited information was available, but it was spread over different systems and was difficult to retrieve. Information technology plays a pivotal role in the L2RM framework, as suitable technology enables a company to react swiftly to lead enquiries and to track customer behaviours, thus gaining deeper understanding of the customer journey (Wizdo and O'Neill, 2014a). The findings also indicate that improving targeting and personalization capabilities are critical to implementing L2RM successfully in the organization. Interview responses showed that the company needed to develop personalized customer communication strategies in order to target the right audience, as the existence of several different tools with overlapping purposes and missing capabilities only caused inefficiencies. Järvinen and Taiminen (2016) argue that B2B companies should focus on developing targeting and personalization strategies in their marketing strategy to maximize engagement with their prospects. However, as Wizdo and O'Neill argue (2014a), the necessary system capabilities depend on the needs of each organization and their existing systems so there is no 'one size fits all' solution for all organizations. The necessary system capabilities identified in this research are based on the needs of the organization and its existing environment, therefore the system requirements for every organization should be individually assessed.

Moreover, the findings of this research suggest that addressing issues about fear of losing control over important decisions is a key aspect when implementing L2RM. Marketing and sales professionals in the company were used to a high degree of autonomy and independence, which was perceived to be endangered by the implementation of a marketing automation tool. The need to address this fear was identified by Homburg, Workman and Jensen (2000) as an important consideration when adopting new IT capabilities. They analyse the case of implementing new IT capabilities for better communication within companies and suggest that information technology changes influence how employees carry out their activities and there is resistance to be expected if the nature of work changes. In the organization, a participative approach has been adopted to successfully manage the resistance. Several respondents stated that involving future key users in the selection process could benefit not only the selection decision itself but also increase the likelihood of adopting the new system. Therefore, this research suggests that involvement of the employees in the new system selection process is an important component in reducing the resistance of the employees to adopting a new system. This finding provides evidence for Boulding et al. (2005), as well as Perna and Baraldi (2014), who state that managing resistance is critical for reaching the expected efficiency improvements through new technologies. However, efficiency improvements due to the newly implemented systems have not been measured due to the time limitations. Understanding the effects of the new systems on the company performance requires further research as this was not within the scope of this research.

5.1.3 People

The people building block focused on identifying skills which required improvement in order to implement L2RM. In addition, this building block also dealt with fostering a collaborative mindset between marketing and sales departments. The issues in the people building block were grouped into two categories: skill limitations and collaboration issues. Skill limitations referred to skill sets which required improvement, such as analytical skills to work with and interpret data to evaluate the campaign performance, inbound marketing skills to set up new campaigns, as well as developing a data driven approach. Collaboration issues entailed problems between marketing and sales departments in terms of insufficient collaboration and information exchange.

The findings suggest that developing analytical skills to gain deeper insights into the customer journey and evaluate campaign performance to optimize results are critical in successful L2RM implementation. This supports the findings from Day (2011), who concludes that there is a skill gap opening due to the increasing complexity resulting from changing customer behaviours due to the digital revolution. This was the case in the organization, where its members were aware of the need to develop analytical skills because of the new tools and available techniques resulting from the digital revolution. This finding also supported Anderson (2009), who identifies analytical skills as a main weakness in marketing departments to meet future challenges.

Additionally, the findings also indicate that developing a data driven approach in marketing and sales departments is a key success factor. Several participants stated that marketing and sales decisions were taken based on gut feeling rather than on data and evidence. Even though data was not easily retrievable in the company to evaluate performance, members from the marketing and sales departments rarely sought data to aid the decision-making process. The result was suboptimal decisions causing inefficiencies to the organization. This research also supports the findings from Kumar et al. (2013), who state that one of the key challenges in implementing data driven marketing is the need to develop data capabilities and data orientation. The two-dimensional approach of Kumar et al. (2013), who identify IT infrastructure and cultural shift towards embracing data and analytics as the main dimension, aligns with the findings of the systems and people building blocks of this research. However, Kumar et al. (2013) do not investigate the processes and organization building blocks that are also studied in this research.

The findings from this research also indicate that improving collaboration and communication between marketing and sales departments is critical for implementing L2RM. Several participants stated that communication between the two departments prior to the research project was limited and both departments were more interested in representing and achieving their own agenda than looking for mutually beneficial solutions. As Wizdo (2014) states, running a successful L2RM framework in the company depends on collaboration between marketing and sales departments. Similarly, Fearon et al. (2013) state that collaboration from campaign creation to revenue generation is essential to implement a technological and process related change. This research provides evidence supporting the arguments of Wizdo (2014) and Fearon et al. (2013).

Additionally, findings from this research suggest that having a platform for regular information exchange between sales and marketing teams is critical to develop and sustain communication between both departments to share information on a regular basis. Several participants stated that prior to the research both departments did not share information on a regular basis, ad hoc solutions prevailed and prevented them to identify strategic solutions. This result aligns with Wizdo and O'Neill (2014b), who recognize regular information exchange as a key factor to foster collaboration between departments.

5.1.4 Organization

The organization building block was the last of the four building blocks used for the implementation of L2RM in the researched company. It focused on the business transformation and cultural change necessary for the change efforts. The issues in the organization building block were grouped into two categories: interdepartmental issues and cultural issues. Interdepartmental issues referred to the goals, which are not aligned between departments, as well as the lack of clarity in ownership of departmental responsibilities. Issues within this category are related to misalignments in strategies throughout the whole organization. Cultural issues entailed problems such as a low level of focus on results, inefficiencies resulting from a very informal company culture and the insecurity created by the increased visibility of performance through the change process.

Findings from this research suggest that focusing on results is a key success factor for implementing L2RM. Prior to the research, the low level of focus on results was recognizable throughout the entire company. Each department focused on improving their own performance indicators without considering the overall impact it had on the company performance. Implementing a result driven company culture requires a change in mindset, which supports the findings of Schaffer and Thomson (1992).

Additionally, findings indicate that eliminating inefficiencies due to the company culture may also be critical to implementing L2RM. Participants stated that the company culture posed a challenge for efficient information dissemination and project execution. The employees tended to let the informal relationships in the organization affect the due diligence of their work. The need to change the organizational culture is emphasized by Wizdo et al. (2016), who describe the implementation of L2RM as a transformational change. According to Gilley, Gilley and McMillan (2009), transformational changes require a change in culture to be successful. Findings from this research suggest that there is a need to make changes in the company culture to accommodate the changes needed for L2RM.

The findings also indicate that new transparent performance measures pose a risk, as they may cause insecurity among the employees. At the risk of failures and mistakes being openly visible to the company, new strategies or ideas may not be implemented. Managing these fears due to the increased performance visibility is key to successful L2RM, which supported the findings from Knodel (2004), who found that decreasing the fear about an increase in visibility and accountability is critical to the success of change initiatives.

The findings also suggest that aligning departmental goals is a key success factor to implementing L2RM in the organization. Several participants stated that the departments within the company were not working towards a common goal, although some participants emphasized the value for the organization to align departmental goals. The findings support Wizdo and O'Neill (2014b), who claim that aligning goals with other departments, such as IT and finance, has the potential to improve the effective implementation of new technologies. Aligning the goals across departmental lines also requires clearly defined responsibilities. The findings from this research indicate that having a clearly defined ownership of responsibilities is an important factor for L2RM success. Several participants stated that tasks which did not have specifically assigned owners ran the risk of not being done, which was cause for frustration when a person in charge of a specific area was not available. The findings support Wizdo (2015) who states that developing a shared sense of ownership across departments with defined responsibilities is critical to implementing L2RM. On the contrary, Bahrami (1992) argues that organizations can be more innovative by keeping ownership flexible. However, the findings of this research align with Wizdo (2015) rather than Bahrami (1992) as the need for clearly defining responsibilities and ownership was evident in the researched organization.

5.1.5 Interrelations of the Building Blocks

As discussed in section 2.3, the building blocks should not be seen as isolated conceptual entities. Rather, they should be acknowledged as interconnected dimensions. Accordingly, the success factors identified for research question 1 under each building block are interrelated with each other.

Between the processes building block and the systems building block, the need to implement a feedback system for performance measures identified in the processes building block has influence on the systems building block and the fear of the staff to lose control. As the staff was not used to having a performance feedback system in place, the fear of losing control over their own performance caused stress in the organization. While implementing a new way of measuring performance is beneficial for the company and the staff, it could also expose low performance, which may be a motivation to resist adoption of the new system.

Between the system and the people building block, the lack of personalization and targeting capabilities identified in the system building block and the needed improvement in inbound marketing skills in the people building block share commonalities. Lacking personalization and targeting capabilities is a sign of low levels of inbound marketing skills, where the systems and people need to operate together in order to develop those capabilities.

Between the processes and the people building block, the insufficient collaboration between marketing and sales teams and the lack of transparency of the marketing sales processes were interconnected. Insufficient collaboration between marketing and sales teams was a trigger for the lack of transparency of the marketing and sales processes and increasing collaboration was key to increased transparency in marketing and sales processes.

Between the people and the organization people building block, the needed improvement in analytical skills within the marketing team and the low level of result driven mindset in the company were interconnected. Analytical and numerical skills among the staff enables the ability to develop a result driven mindset, as the focus shifts to using data for decision making. Developing analytical skills facilitates not only better performance of the marketing team but also aids in the shift towards a result driven mindset in the company.

Between the organization and the processes building block, the lack of clarity about the ownership of departmental responsibilities and the lack of clearly defined marketing and sales processes were interconnected. Without clearly established and agreed upon departmental responsibilities, the processes within each department could not have been well defined either.

Between the organization and systems building block, the increased visibility of performance causing insecurity and the fear of losing control causing scepticism were interconnected. The fear of losing control over activities as a result of marketing automation and the insecurity caused by an increase in performance visibility may have in return effect the adoption of the systems and had to be managed carefully to avoid resistance to change.

5.2 Research Question 2

The second research question of this thesis is “How can these factors be managed for successful implementation of a L2RM framework in the organization?”. This section discusses the findings from the learning set stage supported by the research journal, which focused on addressing the issues in the organization identified from the interviews.

5.2.1 Processes

Creating an end to end process map addressed the lack of clearly defined marketing and sales processes, the changing role division in the sales funnel and the low level of transparency of sales and marketing processes. In order to create clarity in terms of processes between marketing and sales departments, marketing and sales internal processes were mapped out collaboratively with all team members. Next, the newly defined process map, depicting the common goals, displaying each function's role within these goals and emphasizing the importance of mutual process knowledge, was presented to the teams and implemented. The collaborative approach of involving both marketing and sales teams in process has served as means to create an understanding of end to end processes for all stakeholders and greatly increased knowledge of common processes. This initiative has been well received by the organization, increased the commitment from the employees to the change and reduced the confusion between the sales and marketing functions. Defining clear processes and educating the stakeholders about the entire end to end process mitigated the lack of clarity between marketing and sales processes and increased transparency.

These findings are in line with Fearon et al. (2013), who state that the alignment of processes requires the involvement and combined efforts of all stakeholders. In this research project, the action learning approach was utilized to involve the stakeholders in process planning. The processes of the marketing and sales departments have been aligned through cross departmental collaboration. Similarly, Wizdo (2015) states that jointly identifying where the line between marketing and sales lies is an important step for collaboration and Wiersema (2013) observed that in order to align marketing and sales departments, both sides had to be educated about customer relationship strategies and lead generation activities, which were both supported in this research. Although some participants stated that the mutual knowledge about processes may not be necessary, it was deemed to be an important step to increase the buy-in from the stakeholders. Expanding the knowledge of the employees was, in fact, a requirement for the alignment of marketing and sales processes using a participative approach. Without the necessary knowledge, employees could not have contributed to the alignment of processes, thus diminishing the efficacy of a participative approach. This research enabled the alignment between marketing and sales processes by offering education for both sides to deepen their knowledge of the whole process.

The findings from this research also indicate that implementation of the end to end processes enabled a feedback system to measure the performance of L2RM, by providing an effective information flow between marketing and sales departments to measure performance and provide feedback to improve campaign outcomes. The processes implemented in this study were designed as closed loop processes, designed to enable higher visibility in the marketing and sales performance, allowing measurement of the performance of marketing campaigns in terms of revenue generation, as discussed by Wizdo et al. (2014). Homburg, Artz and Wieseke (2012) state that measuring the impact of marketing activities on demand generation and hence, on revenue generation may significantly improve the performance of the organization. Although a feedback system was put in place in the researched organization, the performance of the new processes could not be measured due to the time limitations of this research. Further research is needed to investigate the financial effects of the L2RM processes improvements on the bottom line of the organization.

5.2.2 Systems

Findings from this research provided evidence that implementation of a marketing automation tool may be able to address several key issues that create obstacles for successful L2RM implementation: slow engagement with new leads; insufficient insight into the customer journey; and lack of personalization and targeting capabilities. Prior to the research, the marketing and sales departments were unable to create effective engagement with the right prospects at the right point in time due to misalignments between the departments, which created inefficiencies in how the leads were processed by the marketing and sales teams. Therefore, the implementation of a marketing automation tool was identified by the learning set as an approach to work on the system limitations. Although it was strongly evident that the employees were aware of problem areas, the findings revealed that the marketing and sales departments were not communicating effectively. When the opportunity was provided for members from both departments to voice their opinions, employees were willing to take part in identifying common solutions and collaborated effectively to make the systems selection decision.

The implementation of a marketing automation system targeted to improve understanding of the customer journey in order to optimize engagement with prospects and standardize the lead follow up process to eliminate inefficiencies. Another major benefit expected from marketing automation is the possibility to automate marketing processes through personalization and targeting, thereby improving the effectiveness of customer engagement. The findings of this research supported the arguments of Wizdo and O'Neill (2014a), who state that once implemented, L2RM facilitates the possibility to track online behaviours thereby deepening understanding of the customer journey. Furthermore, this research supported Newberry, Wessner and DeCarlo (2008) as well as Biegel (2009), who suggest that marketing automation facilitates increased the efficiency and effectiveness of marketing activities. According to Wizdo and O'Neill (2014a), over time marketing automation tools enable the marketing department to understand customer behaviours and the newly gained insights allow the company to deepen their knowledge about the customer journey and optimize their engagement. This research provided evidence that marketing automation can potentially address the issues around slow engagement with new leads, insufficient insight into the customer journey and lack of personalization capabilities, however efficiency improvements due to introduction of the marketing automation system could not been measured due to the time limitations. Even though the implementation of marketing automation was seen as successful in the organization, the financial impact that the marketing automation had on the bottom line of the organization was not observed in this research.

Findings from this research suggest that the implementation of a new tool was a source of fear among some of the employees, who were used to a high level of flexibility in their marketing and sales activities. Several participants stated that they felt fear about losing control over their activities due to automation. This issue was approached by using open communication to address their uncertainties. At the same time, involving the employees in the selection process provided them with the opportunity to learn about the functionalities of the new tool and thereby identify changes to individual roles, which reduced the feeling of losing control. This issue was addressed by involving the employees in the selection process and identified as a success factor in reducing resistance to adopting the new system, as participants reported that their voice mattered.

The implementation of a new system may have initially been perceived by some employees as a potential way to exert more control over marketing and sales activities while at the same time removing decision-making power. Additionally, not involving key users of the new system could have resulted in increased resistance to marketing automation. Without a participative approach, the implementation of a new tool, which was perceived as a control mechanism by the employees, could have been perceived as being imposed by leadership without considering the needs of the stakeholders.

The participative decision-making approach facilitated answering the concerns early on and eased the adoption of the new system. Therefore, this research supports the arguments of Ahearne et al. (2012), who recommend that sales and marketing departments are the major stakeholders in systems implementations and should be involved early on in the change process. Similarly, the findings support Jackson and Philip (2010) and Fearon et al. (2013), who suggest that more inclusive approaches are favourable to strict top down driven implementations since employees are encouraged to come on board. Fearon et al. (2013) recommend involving all affected departments into the change initiative from an early point on if a technology implementation has influence on departments other than the main beneficiary. Involving the marketing, sales and IT departments in the marketing automation selection process was observed to work effectively in the researched organization. The early involvement of all stakeholders has been considered through this research and was identified as a success factor in the implementation of marketing automation. Involving the employees in selection of the marketing automation tool may have addressed the fear of losing control because key users had the opportunity to evaluate the tools and were thereby able to learn about the capabilities of the system. Early involvement in the selection process created a positive environment and virtually no resistance towards the marketing automation tool was registered. The findings from this research show that following a participative approach in the system selection process helped to remove any potential resistance to the adoption of a new system and the stakeholders were satisfied with the possibility of taking part in the decision-making process.

5.2.3 People

Findings from this research have shown that training for employees to close skill gaps may be able to address the need to develop analytical skills, inbound marketing skills and data driven mindset. To close this gap, training to develop the necessary analytical and inbound marketing skills have been planned and a new position in the marketing team has been proposed. Taking initiatives to develop the necessary analytical skills in the marketing team is in line with Leeflang et al. (2014), who suggest that organizations can successfully close the talent gap through training employees as well as via external recruitment. Similarly, Verhoef, Kooge and Walk (2016) state that marketers have to improve their decision-making style by using data analytics, which can be achieved through either intensive training or replacement. This is an important step not only for improving the performance of the company, but also for preparing for the potential shortage of digital and analytical talent predicted by Järvinen and Taiminen (2016). From the practitioner literature, this research aligns with the view of Wizdo (2014), who identifies that marketing teams need training to succeed with L2RM and that new roles and responsibilities have to be defined within marketing departments. This research also found that inbound marketing skills were insufficiently developed in the company and could have been a potential obstacle for successful L2RM. This supports the findings of Wizdo (2014), who finds that lack of inbound marketing skills is one of the main barriers. However, it should be noted that the training needs identified in this research are based on the existing marketing team in the researched organization and may vary depending on the company and the industry. Accordingly, the research findings may not be applicable to other organizations in other companies or in different industries, as existing skills and the needs of the marketing team are unique for each organization. Royle and Laing (2014) identify analytical skills and inbound marketing activities as crucial for marketing teams to be prepared for the future challenges of the digital revolution, however the authors do not take the unique composition and needs of the marketing teams into consideration. In addition to Royle and Laing's (2014) findings, this research also identified the need to be more data driven as essential to being prepared for new digital marketing challenges.

Findings from this research also indicate that the implementation of sales and marketing alignment meetings addressed the issues of insufficient collaboration between marketing and sales, as well as the lack of a consistent information exchange platform. Participants stated that discussions about implementing recurring meetings between marketing and sales departments were intense, however the benefits of these meetings became rapidly evident and all stakeholders agreed on attending the recurring meetings. The alignment meetings showed high potential to resolve collaboration issues between the sales and marketing teams. The participative nature and early involvement were considered factors positively influencing the openness towards change from the employees. However, the type of marketing and sales alignment meetings that this study employed might not be the appropriate collaboration for all organizations. The appropriate collaboration platform for each organization may differ due to team structures, geographical proximity of the team members and their usual interactions.

5.2.4 Organization

Findings from this research indicate that creating KPIs that overarch marketing and sales departments addresses several issues posing an obstacle to L2RM implementation: unclear and unaligned departmental goals; unclear ownership of departmental responsibilities; and the increased visibility of performance creating insecurity. Prior to this research, there was insufficient clarity about the responsibilities of the marketing and sales departments. To resolve this issue, the marketing and sales departments worked together to create common goals and metrics, thereby creating alignment between marketing and sales goals. These findings support Wizdo (2015), who finds that a company needs to develop shared ownership between marketing and sales, where responsibilities and ownership between departments had to be defined. The new set of goals connected the responsibility for company success across departmental lines. This initiative was received with scepticism from some team members, as the performance of the departments was tied to each other's success. However, emphasizing that success may only be achieved through collaboration resolved the tensions. While the marketing and sales departments aligned their goals, findings from this research also indicated that alignment with other departments such as IT and finance could be beneficial for successful L2RM. Recommendations to align departmental goals have been proposed to top management, in order to identify and align responsibilities throughout the entire organization and thereby reduce inefficiencies. Nevertheless, the joint responsibility and increase in performance visibility caused some insecurity among the employees, which supported the findings from Knodel (2004), who found that the higher the levels of tolerance towards unclear performance measures and loose accountabilities are, the higher the insecurity towards more rigorous performance measures is.

In order to shift towards a highly result driven company mindset and more efficient organizational culture, the promotion of a result driven culture has been recommended to top management. Emphasizing the need for collaboration and encouraging new ideas was critical in initiating the shift towards an open and encouraging organizational culture. The suggestion to use cross-functional teams and collaborative decision-making has also been recommended to top management. This research found evidence supporting the findings of Schaffer and Thomson (1992) who find that a shift in mindset is necessary to achieve a result driven company culture, which was also critical in the researched organization to move the company towards a result driven state. The implementation of L2RM in the company was perceived as challenging but not as disruptive, as the organization had the time to become familiarized with the changes undertaken. The implementation followed a step by step process divided into building blocks and followed the action learning cycles. Aligned with the findings in the literature (Garetti et al., 2005), the step by step implementation has worked effectively for successful change management in this project.

5.2.5 Interrelations of the Building Blocks

The action items identified for research question 2 under each building block are also interrelated with each other.

Considering the interrelation between the processes building block and the systems building block, the implementation of the end to end processes revealed the need to implement a marketing automation tool in order to effectively execute the ideal processes. Having clearly defined and effective processes in place was also necessary to select the most appropriate systems for the organization.

The interrelation between the systems building block and the people building block, revealed the need to improve skills in the people building block as a result of the decision to implement marketing automation. To gain the ability to work with the new systems and processes, marketing and sales teams needed to develop new skills.

Between the processes and the people building block, the insufficient collaboration between marketing and sales and the lack of transparency in processes both led to the implementation of marketing and sales alignment meetings, which were a part of the end to end L2RM process implemented in the company.

Between the people building block and the organization building block, the analytical and inbound marketing skills training and the implementation of result driven mindset were interconnected. The trainings were necessary to start a shift towards a result driven mindset in the organization, as also members from departments other than marketing and sales took part in this training.

Considering the people and organization building block, the implementation of sales and marketing alignment meetings and KPIs overarching marketing and sales departments were interconnected. The alignment meetings serve as stage for marketing and sales teams to discuss tactical and strategic issues, while at the same time considering their joint performance.

Regarding the organization and processes building blocks, the creation of the end to end process and its implementation was interconnected to the implementation of a result driven mindset. Presenting the end to end process to all stakeholders showed the importance of focusing on results in L2RM.

Considering the organization and systems building block, the participative marketing automation selection process, open communication and the overall participative approach applied during the change process helped to manage the issues related to organizational culture and eased the implementation of a result driven mindset in the organization.

5.3 Concluding Words

This chapter discussed and interpreted the findings from my research and answered the research questions underlying the thesis. Both research questions have been answered from the perspective of each building block. The research findings have been compared with the existing knowledge in the literature. I was able to conclude that there is a large array of success factors involved in the implementation of L2RM, which can be grouped into the four building blocks based on Verhoef, Kooge and Walk (2016): processes; systems; people; and organization. In order to manage these success factors, this study identified the following action items for my organization: creating an end to end process map; informing stakeholders about L2RM; executing new L2RM process; implementing marketing automation tool; providing open communication for all stakeholders; applying a participative selection process for marketing automation tool; training the employees about analytical and inbound marketing skills; hosting marketing and sales alignment meetings; creating KPIs overarching marketing and sales departments; and implementing a result driven mindset.

The next chapter concludes this thesis by presenting my personal learning from this research as well as the organizational learning which took place. Research limitations and recommendations for future research are also laid out in the next chapter.

CHAPTER 6 - CONCLUSION

This research has investigated the organizational implications of shifting towards a result driven marketing strategy and identified approaches to managing success factors. Using a conceptual framework consisting of four building blocks processes, systems, people, and organization this research identified various issues within each building block and identified approaches to address them.

Processes building block entailed the collaboration between the departments, the clarification of the sales funnel and performance measures to appropriately assess the contribution of marketing activities to revenue generation. The issues in the processes building block have been grouped into two categories: structure issues and alignment issues. Structure issues have been addressed by creating an end to end process map and the alignment issues were addressed by holding information sessions for all participants about L2RM and by initiating the implementation of the end to end L2RM process.

Systems building block entailed the technological aspect of choosing and implementing suitable systems for the company, as well as potential resistance to new technology from the employees. The issues in the systems building block have been grouped into two categories: system limitations and adoption issues. Implementing a marketing automation tool addressed the system limitations, whereas using a participative selection process for the marketing automation tool addressed the adoption issues.

People building block focused on identifying skills which required improvement in order to implement L2RM. In addition, this building block also dealt with fostering a collaborative mindset between marketing and sales departments. The issues in the people building block have been grouped into two categories: skill limitations and collaboration issues. Skill limitations were approached by offering external training to develop analytical and inbound marketing skills, while the collaboration issues were tackled by implementing and hosting sales and marketing alignment meetings.

6.1 Scholarly and Professional Implications

This research project has been an intense learning experience for me as a practitioner researcher. I had to wear two very different hats and stay objective to deal with this role duality without compromise, which has admittedly been challenging at times. Even though the level of support and commitment I have received from the organization made my dual roles as a researcher and a manager easier, ensuring to be objective in each role and managing the conflicts has been quite a journey. This journey was recorded via journal entries, which has shown my development as a scholarly practitioner. While the earlier entries in the research journal showed less objectivity and inquisitiveness, latter entries were characterized by a more objective stance and a more holistic view on the organization. In early action learning cycles, I realized that my opinions tended to align much closer with the views expressed by marketing team members, rather than the sales team members. This made me question if my views were objective. Such reflective journal entries helped me in developing a more objective view to the issues in the organization, as noted in Reflective Pause 1.

Having a practitioner background, I had several biases and assumptions, which I developed over a period working for the organization. It was necessary for me to wear a scholarly hat and look critically at myself in order to conduct this research. Additionally, this research helped me in viewing my own practice critically from a different perspective. I realized that my prior managerial practice was strongly focused on decision-making in a closed environment without participation. Prior to this research, I might not have considered to apply a participative decision-making approach to a project of such strategic importance and magnitude, which was evident from Reflective Pause 4. Because of the inherent complexity in participative decision-making, I would have seen such an approach as an actual threat to the project, as too many voices would have needed to be heard, which could have ended up in chaos. After completing this research, I am convinced that applying a participative approach leads to better solutions than plain top-down implementations, since a top-down approach could leave many concerns unaddressed and result in chaos. I have come to realize that a collaborative decision-making approach is extremely effective and powerful to reveal different perspectives to the problems, which I do not often have access to as a manager. This helped me to see the real magnitude of the information and the opportunities to learn through a collaborative approach such as action learning. I experienced the benefits of participative decision-making especially in two major instances during this research. The creation of the end to end process maps, as well as the decision of which marketing automation tool to implement was executed by involving multiple stakeholders into the decision-making process. Involving the other stakeholders in the decision-making process helped me to see different perspectives of the problem.

This research further served me as proof that the action learning methodology is suitable for change management in the organization, in particular for the implementation of a challenging change initiative involving many stakeholders. Using an action research methodology made me realize how I, in my role as a manager in the organization, was contributing to the problem. The answers to many questions the organization was struggling with were available from the beginning, as evidently the employees quite accurately knew where the problem areas were and their knowledge was invaluable to the outcome of this research. However, the open and flat culture of the organization also played an important role in this outcome as the employees were willing to state their opinions freely and were interested in being a part of this project.

Even though the requirements of coordinating and organizing the participation of the stakeholders in a change initiative are considerable, in my particular case it greatly supported problem identification and the process of addressing the identified problems. However, this increased effort in early stages of a project seemed to pay off when the implementation was completed, as the satisfaction from all stakeholders appeared to be greater and resistance was minimal. Moreover, the appreciation, commitment and motivation gained through involving employees in the decision-making and empowering them has proven to be very successful through this experience. Not only have the problems identified in the beginning of this research been successfully addressed, this project triggered learning for the organization, which is perhaps ultimately the bigger success for the organization and its members.

This research helped me grow as a scholarly practitioner and helped me create actionable knowledge. By using action research as methodology, I was able to navigate through the rigour-relevance tensions. From a practitioner point of view, I have become more reflexive and I put greater emphasis on understanding different opinions, which significantly contributed to the identification of action items that were relevant and holistic. From a scholarly point of view, this research has helped me in developing more academic rigor. Conducting an extensive literature review about L2RM before starting to collect data was a useful step to expand my theoretical knowledge about L2RM. Developing the conceptual framework for this research and deciding on the most suitable methodology was critical to execution of data collection and data analysis as planned. This change initiative required major effort from all people involved. Having a rigorously prepared conceptual framework and academic base for the implementation proved beneficial in ensuring the effort of many stakeholders was not invested in vain. Balancing rigour and relevance resulted in actionable knowledge and encouraged organisational learning. I plan to resort to this approach again for strategic change initiatives in a complex setting and with several stakeholders of differing opinions involved.

6.2 Organizational Learning

The organizational learning which I observed during this research was remarkable. The selection of action learning, and the application of action learning cycles, have resulted in several positive effects for the entire organization. One of the biggest accomplishments for the organization, which was not directly related to L2RM, was that the basic components of the action learning methodology were acquired by other individuals within the company. Several participants stated that they plan to apply action learning cycles in their practice to increase reflection and to increase participation of their team members in decision-making. Similarly, other participants in this research stated that they to plan to use participative decision-making combined with learning set meetings for projects in the future. This is an encouraging aspect, as the company culture appear to be naturally accommodating to action research, since members of the organization are willing to share their thoughts and opinions. Applying participative decision-making appeared to motivate people to play an active role when addressing issues. In past change initiatives, the resistance was typically greater, mainly because many questions were left unanswered and led to problems later on during the change process.

The organizational learning that resulted from this project was enabled with the usage of learning set members as change agents, as described by Caldwell (2003) and appeared to have supported the adoption of the change initiative. Considering the learning effects for the participants, using action research approach with learning sets was suitable for this research, as several participants stated that they have learned from this experience, thereby creating at least the beginning of a learning organization as described by Caldwell (2003). The action research approach and the use of learning sets fostered a learning environment for all people involved in this transformational change. This learning was not limited to the learning set members. Members of the marketing and sales teams have also taken part in organizational learning through their active involvement in various stages of the project and their interactions with the learning set members. This research also confirmed that succeeding in transformational changes in the organization was greatly increased with sponsorship from top management (DeViney et al., 2012), as the top management showed their support for this project. It also supports the view of Fearon et al. (2013), who find that successful transformational changes must go beyond processes and need to entail the social and cultural aspects, which were also a part of this research in the people and organization building blocks.

The stakeholders involved were satisfied but also surprised about how well the implementation of L2RM went compared to prior change initiatives. Several participants and learning set members stated that one of the most important intangible benefits of this approach was that by providing the possibilities for more people to be involved, it also facilitated all involved participants to learn from and interact with each other, thereby increasing the openness towards change. Factors that facilitated the implementation of L2RM in the organization were the open communication with the stakeholders from early on and setting clear expectations. Following this strategy, combined with the usage of learning set members as change agents and involving stakeholders in decision-making processes, gradually increased the buy-in across all stakeholders. This aided in receiving further feedback across all involved people and created a productive and supportive environment for the implementation of L2RM and fostered the organizational learning.

The change project in the researched company was considered to be successful by the organization as it resulted with a framework in place providing the ability to gain a clear line of sight from campaign level to the company revenue, allowing the marketing department to identify the individual campaign contributions to the revenue generation.

6.3 Research Limitations

This research has some limitations due to the time boundaries it had to meet. It could be argued that the success of the L2RM in the organization should be evaluated at the point in time when the organization is fully proficient with the L2RM. Additionally, it can be argued that the success of the L2RM should be measured through a change in revenue of the organization. This research could not be conducted over a time frame sufficient to measure any quantitative aspects of the L2RM due to the lengthy sales cycles in the organization.

Additionally, this research has been conducted in a single organization and in its specific setting, therefore cannot be generalized to all other organizations. A particularly important fact in this research was the open and informal culture of the organization. Members from the organization were not fearful of stating their opinions, which may not be the case in very hierarchical companies. The organizational setting was favourable for action research as the employees are happy to talk and state their opinions. Participants were willing to share their concerns openly, which may not be the case for other organizations, thus posing additional challenges in identifying issues within the organization. Additionally, my organization is active in a very dynamic industry, which requires leadership and employees to be constantly informed about new developments and to adapt accordingly. Companies from other industries may identify other challenges and success factors for the implementation of L2RM. To be able to generalize these findings to the other organizations, this research would need to be repeated in other organizational settings.

6.4 Recommendations for Future Research and Practice

As identified in the literature review, L2RM is a concept developed from the practitioner field. The existing academic research discusses concepts forming a conceptual basis for L2RM, such as the paradigm shift in B2B marketing resulting from the digital era and the relationship between marketing performance and organizational performance, however L2RM in an organizational setting has not been widely covered. Therefore, L2RM offers the possibility for substantial research. Research about the implementation of L2RM in other industries could broaden knowledge and solidify or challenge the findings from this research. Further research could validate the conceptual framework used in this research to confirm if the four building blocks as presented are suitable for other organizations as well. Also, research about the impact of L2RM on the revenue of the company could help to quantify the impact of L2RM in an organization and understand the ROI of implementing a L2RM framework. A quantitative research spanning over a longer period, which investigates the impact of L2RM on organizational performance may help to understand the long-term effects of L2RM on company success.

The framework used in this research could potentially find application in different implementations, ranging from strategical framework implementations to business process redesigns. The four building blocks used in this research could be applied in many change initiatives, even though it may require different weight on each building block. Using this framework when planning change initiatives supports the change initiator to think within the scope of each building block, thus considering every necessary aspect for change initiatives.

This research has suggested that age may be a factor in adopting and driving the change initiatives in the organization. The younger staff members appeared to exert a positive influence on the willingness and ability to change. Future research is needed to investigate the influence of age as a driving factor of change initiatives.

Practitioners wanting to apply this approach in their organization should pay attention to their unique organizational setup and organizational culture. Using interviews for problem identification was useful for this research and practitioners need to carefully prepare the interview protocol to allow interviewees to answer as freely as they want. It was advantageous for my research that the organizational culture always embraced directness and openness and the employees were willing to share their opinions. However, in organizations with less open communication, the interview protocol might have to be very cautious with asking sensitive information.

For conducting the learning sets, I recommend to carefully select learning set members. Finding participants who display the right balance between outspokenness and ability to listen and ask questions is key. Additionally, having participants from different stakeholders and different organizational levels added value to my research. However, depending on the organizational culture, conducting learning sets with participants from very different hierarchical levels may pose challenging for the free flow of discussions.

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APPENDIX A - DBA ETHICS APPROVAL LETTER

Dear Gulsun Hoscanoglu

I am pleased to inform you that the DBA Ethics Committee has approved your application for ethical approval for your study. Details and conditions of the approval can be found below:

Committee Name: DBA Ethics Committee
Title of Study: Organizational Implications of Shifting Towards a Results-Driven Marketing Strategy: Implementing a 'Lead to Revenue Management System' in an IT Company by Introducing Financial Metrics to the Marketing Organization
Student Investigator: Gulsun Hoscanoglu
School/Institute: School of Management
Approval Date: 12 April 2016

The application was APPROVED subject to the following conditions:

- The researchers must obtain ethical approval from a local research ethics committee if this is an international study
- University of Liverpool approval is subject to compliance with all relevant national legislative requirements if this this is an international study.
- All serious adverse events must be reported to the Sub-Committee within 24 hours of their occurrence, via the Research Integrity and Governance Officer (ethics@liv.ac.uk)
- If it is proposed to make an amendment to the research, you should notify the Committee of the amendment.

This approval applies to the duration of the research. If it is proposed to extend the duration of the study as specified in the application form, the Committee should be notified.

Kind regards *Dr Clare Rigg*

DBA Ethics Committee
University of Liverpool Management School in Partnership with Laureate Online Education

APPENDIX B - INTERVIEW PROTOCOL

Interview protocol

Interviewee (Title and Name):

Introduction

I would like to audio record our interview today in order to facilitate transcription, which is necessary for the data analysis of the interviews. This interview is an important step for the lead to revenue management project investigating the shift towards a result driven marketing strategy. The most emerging topics from the interviews with all participants will serve as the conceptual basis for the learning set meetings that will take place once in every two weeks with the purpose of discovering new ways of solving problems, deciding on action items and reflecting on the outcomes. The information you provide in this interview is only available to myself and will not be published, nor will your personal information be disclosed. Please remember that your participation is voluntary and you may withdraw at any time. Also, please be aware that you may only disclose information which you are comfortable sharing with. I have planned this interview to last for maximum of one hour. I have prepared a set of questions which I would like to cover with you.

Questions

Processes

- How would you describe the current demand generation process?
- How would you describe the ideal process from campaign creation to revenue?
- What are the inefficiencies in the current marketing and sales processes?

People

- What do you think are the key skills needed for the marketing and sales teams?
- Which skills are currently lacking or insufficient in marketing and sales teams?
- What do you think about the alignment between marketing and sales teams?

Systems

- How would you evaluate the current data capabilities and tools available to marketing and sales teams?

- What new information systems do you think marketing and sales teams should adopt to improve demand generation?

- What are the challenges you expect from implementing new marketing and sales systems?

Organization

- What are the main challenges and obstacles for organizational change in this company?

- How well are the goals of different departments throughout the organization aligned?

- What do you think would need to be changed to achieve a result driven organization?

Wrap-up

- We have discussed the process, the people, the systems and the organization. Are there any other areas we did not touch upon and you think are relevant?

APPENDIX C - RESEARCH JOURNAL EXTRACT

Learning Set Session 2 – 04.11.2016

Reflections since last LS

[redacted]

- the questions from the info session → positive sign because it shows the interest from people
- I have seen at least with my team that they glad to be invited and be part of bigger decision. Several of them told me they are positive and on board with plan so far.

[redacted]

- some of the guys in my team were initially surprised about being invited into this session, as rumors suggested that it is only a marketing thing. His team is happy to be involved and to be a part of this process.

[redacted]

- asked if [redacted] knew where the rumors came from → no

[redacted]

- making the process maps was really tough, many of us didn't fully know how to make a process flow chart, what kind of elements does it have
    - several people were surprised about the real process, some of the guys didn't know about the details.

[redacted]

- same opinion (info session)
- having this session so early is going to help to motivate people for L2RM
- process map made them think about what are the real work steps that they do, and what all is really adding value to the team.
    - should have done it long time ago, but there was always something else that got priority, defining processes should have been high priority

[redacted]

- happy with the interest especially from sales side, he wasn't expecting so much interest from them
- creating process maps showed inconsistent sales processes

[redacted]

- everyone is doing their own thing, everyone has their own style
    - having to change style made some unhappy, it takes away freedom to move fast with hot customers
- having the info session early was a chance for LS to know about any early concerns and discuss
- only one critical comment from sales about timing of implementation, mentioning that implementation is company goal helped.

[redacted]

- agreed with [redacted] and [redacted] (info sessions)
- not involved in process map creation

[redacted]

- agreed with LS (info session)

[redacted]

- asked if [redacted] has talked with participants about info session

[redacted]

- talked to three people after info session. People seemed to be open-minded towards L2RM

APPENDIX D - THEMATIC ANALYSIS EXTRACT PHASE 1

Processes

- How would you describe the current demand generation process?

Interviewee: Demand generation process, you mean from start to finish? I don't know the entire process from beginning to end. I think that it very much depends on who is working on what. Everyone has their own best practices of how to get something done. I see that it has both advantages and disadvantages. On the one hand, it provides us a lot of flexibility to find out what's best, on the other hand everyone works different and the outcome of it can be very different. Thinking about demand generation, this also involves sales. I don't really know what happens on the sales end.

Gulsun Hoscanoglu
Lacking process knowledge

Gulsun Hoscanoglu
No clear processes defined

Gulsun Hoscanoglu
No clear processes defined

Gulsun Hoscanoglu
Sales processes not known

- How would you describe the ideal process from campaign creation to revenue?

Interviewee: The ideal process should be well defined with a clear sequence of steps. How these steps in the process work should be crystal clear to all people involved. If we can manage to follow a structured process like this, I can imagine things to move forward much more smoothly. This would also make our jobs much easier when onboarding new colleagues. But processes can also be too restrictive. Sometimes we need flexibility to handle leads in a different way so they can convert likelier. Therefore, I think that processes should not be too restrictive.

Gulsun Hoscanoglu
Mutual knowledge among stakeholders

Gulsun Hoscanoglu
Limitations processes

Gulsun Hoscanoglu
Transparent process needed

Researcher: Why do you think these restrictions are there?

Interviewee: Control. People want to measure and be able to control. Restrictions are also there to make sure that people adhere to the process, otherwise it would end in chaos.

Gulsun Hoscanoglu
Insecurity due to control

- What are the inefficiencies in the current marketing and sales processes?

Interviewee: For example, in the step from MQL to SQL in sales force, there can be a couple of improvements. A marketing qualified lead in value is a great asset.

Researcher: What do you mean in value?

Interviewee: So you have for example MQL who did some research 2 years ago and now he comes back. This lead will be more likely to convert than other leads, but we can't pinpoint these high value leads and prioritize them. It's just one of the examples. I think we have to make some past due change to separate good leads from bad ones. I don't think we have any processes for that. Marketing automation can make this work. Maybe not perfectly but mistakes will be way less. But to qualify a lead, for example, if we would have a simple ABC, A being a really good MQL, B medium, C probably not likely to convert, then this means that we discuss easily: these are A, there are B, there are C. So the A ones, are more likely to being converted and you can prioritize them. For example now, we had a call with [redacted] with [redacted]. So I discussed otherwise, the same with [redacted], because with some clients, you just want to be moving fast and skip all the unnecessary calls and stuff like that, because the faster it goes, the more likely it is to convert the lead, and everybody agrees with that.

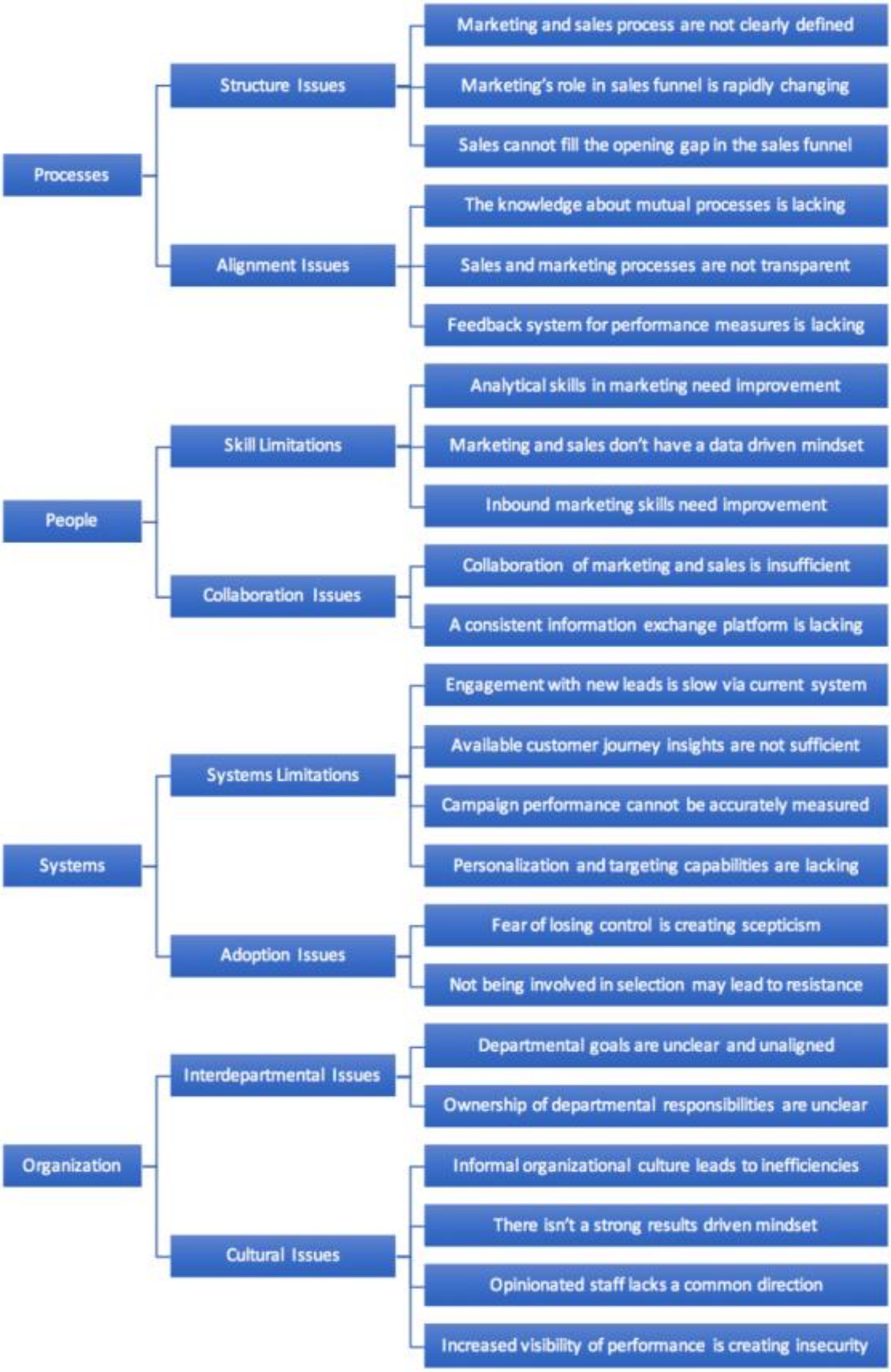
Gulsun Hoscanoglu
No clear processes defined

Gulsun Hoscanoglu
Marketing automation

Gulsun Hoscanoglu
Slow engagement with new leads

APPENDIX E - THEMATIC ANALYSIS EXTRACT PHASE 2

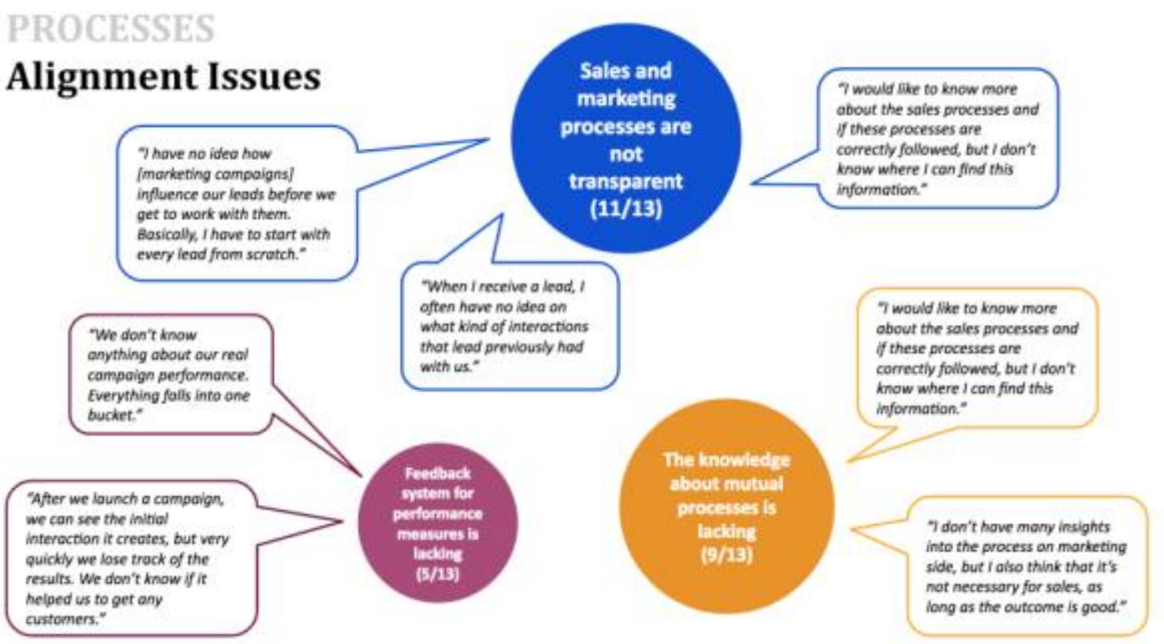
APPENDIX F - THEMATIC ANALYSIS EXTRACT PHASE 3



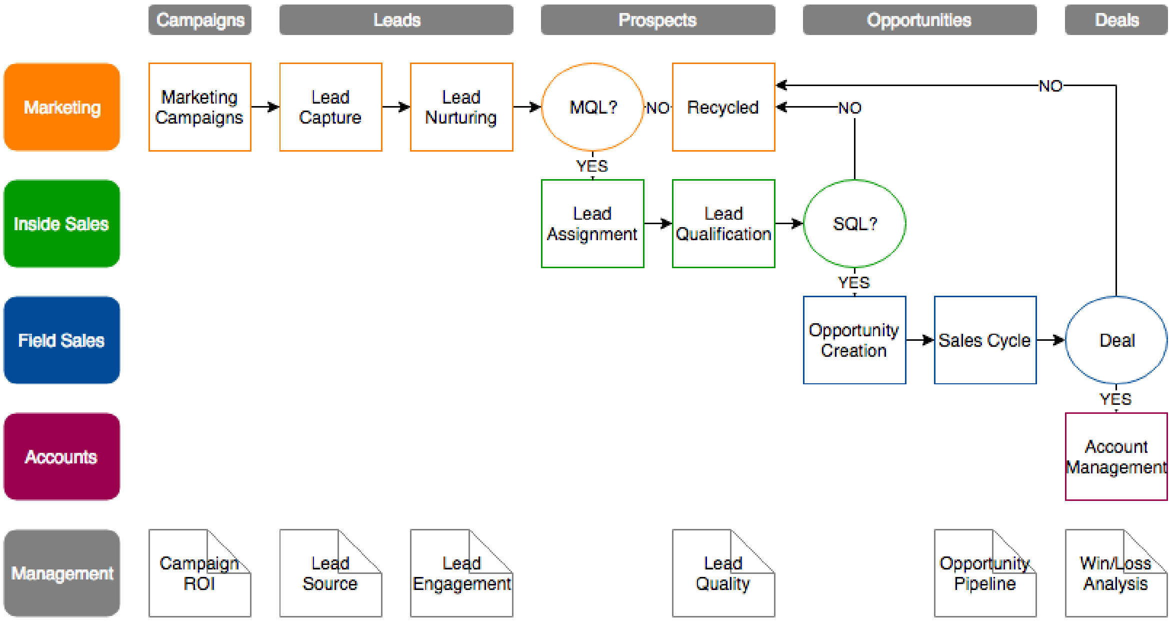
APPENDIX G - THEMATIC ANALYSIS EXTRACT PHASE 4

Marketing and sales process are not clearly defined	Marketing and sales process are not clearly defined
Marketing's role in sales funnel is rapidly changing	Role division in sales funnel is rapidly changing
Sales cannot fill the opening gap in the sales funnel	
The knowledge about mutual processes is lacking	The knowledge about mutual processes is lacking
Sales and marketing processes are not transparent	Sales and marketing processes are not transparent
Feedback system for performance measures is lacking	Feedback system for performance measures is lacking
Analytical skills in marketing need improvement	Analytical skills in marketing need improvement
Marketing and sales don't have a data driven mindset	Marketing and sales don't have a data driven approach
Inbound marketing skills need improvement	Inbound marketing skills need improvement
Collaboration of marketing and sales is insufficient	Collaboration of marketing and sales is insufficient
A consistent information exchange platform is lacking	A consistent information exchange platform is lacking
Engagement with new leads is slow via current system	Engagement with new leads is slow via current system
Available customer journey insights are not sufficient	Available customer journey insights are not sufficient
Campaign performance cannot be accurately measured	
Personalization and targeting capabilities are lacking	Personalization and targeting capabilities are lacking
Fear of losing control is creating scepticism	Fear of losing control is creating scepticism
Not being involved in selection may lead to resistance	Not being involved in selection may lead to resistance
Departmental goals are unclear and unaligned	Departmental goals are unclear and unaligned
Ownership of departmental responsibilities are unclear	Ownership of departmental responsibilities are unclear
Informal organizational culture leads to inefficiencies	The company mind set is not highly result driven
There isn't a strong results driven mindset	
Opinionated staff lacks a common direction	Informal organizational culture leads to inefficiencies
Increased visibility of performance is creating insecurity	Increased visibility of performance is creating insecurity

APPENDIX H - PRESENTATION OF THE ISSUES EXTRACT



APPENDIX I - HIGH-LEVEL PROCESS MAP



APPENDIX J - MARKETING AUTOMATION TOOL EVALUATION SHEET

Marketing Automation Tool Evaluation Sheet

REQUIREMENT	NEED	Vendor 1	Vendor 2	Vendor 3
General & Technical				
Cultural Fit	Optional	1	3	3
Financial Stability	Optional	2	2	2
Software Flexibility	Required	2	3	2
Ease of Implementation	Required	3	2	2
CMS Integration	Required	2	3	2
Secure Remote Access	Optional	3	3	1
Minimal I/T Staff required for Set-up and/or Maintenance	Optional	3	2	2
Microsoft Office Integration (Excel import/export)	Required	2	2	3
PPC Application Integration (Google AdWords, etc.)	Required	2	3	2
Daily Visitor Activity Reports - automatically sent to sales/marketing users	Optional	1	2	2
General & Technical Totals		**21**	**25**	**21**
Marketing Automation				
Automation				
Campaign scheduling & automation	Required	2	3	2
Automated emails sent upon form conversion	Required	2	3	2
Lead scoring based on profile & activity history	Required	2	3	3
Leads routed based set of rules	Required	1	2	2
Prospects can be added to drip campaigns	Optional	3	2	1
Dynamic marketing campaigns based on if/then logic or behavior	Required	1	3	2
Campaign Management				
Integrate multi-modal channels on one platform	Optional	2	2	1
Budget analysis, ROI and campaign response	Required	2	3	1
Analytics Integration (Google Analytics, etc.)	Required	1	3	2
Marketing Campaign ROI (search, direct mail, PPC, cold-calling, tradeshow)	Required	1	3	2
Event Management				
Automation of pre and post event marketing activities	Optional	3	2	1
Registration handling	Optional	3	2	1
Integration with 3rd party webinar platforms	Optional	2	3	1
Event size management	Optional	2	2	1
Data Management				
De-duplication, Validation, Append	Optional	1	2	1