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MASTER'S THESIS

IMPROVING THE MARKETING PROCESS IN A BUSINESS EVENT ORGANIZING COMPANY

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LIST OF ABBREVIATIONS

AI- Artificial Intelligence

API- Application Service Provider

BI- Business Intelligence

BP- Business Process

BPM - Business Process Management

BPMN - Business Process Model and Notation

B2B- Business to Business

CRM- Customer Relationship Management

CSF- Critical Success Factors

ERP- Enterprise Resource Planning

HRM- Human Resources Management

IoT- Internet of Things

IT- Information Technology

KPI- Key Performance Indicators

ML- Machine Learning

RFP- Request for Proposals

RPA- Robotic Process Automation

SaaS- Software as a Service

SCM- Supply Chain Management

SMEs- Small and Medium Sized Enterprises

INTRODUCTION

In the past and even more today, in order to be competitive, companies need to perform their business processes as efficiently and as successfully as possible. A business process (BP) is defined as a collection of activities that are coordinated and performed in a certain technical and organizational conditions in order to achieve a business goal (Weske, 2007). Organizations should be aware of all the business processes that are performed and carefully analyze and examine what could be done better.

Business Process Management (BPM) is a management concept for organizing work in an organization to ensure consistent outcomes and to take advantage of improvement opportunities (Dumas, La Rosa, Mendling & Reijers, 2018). It includes different methods, concepts and techniques that enable an explicit and clear representation of the business processes and the activities inside them together with the constraints. Once this is successfully done, it allows for analyzing, designing, administering and configuring the business processes (Weske, 2007).

In the society that we live in today, innovations and many new technologies such as: Internet of Things, Artificial Intelligence, big data analytics, mobile technologies, real-time technologies, social media, etc. stimulate innovations and transformation in businesses. So, Information Technology (IT), through BPM must be incorporated in business processes since it is of an extreme importance for innovation and consequently, competitiveness (Vom Brocke & Schmiedel, 2015).

One such company, that is in a need of innovation and process improvement is BOS (this name will be used when referring to the company since the exact name shall not be given due to privacy reasons). BOS is a medium-sized, business to business (B2B) company that organizes business events in numerous different industries. According to Keller & Kotler (2015), marketers can market 10 types of entities: physical goods, services, experiences, people, places, events, properties, information, organizations and ideas. In this case, the marketing department of the BOS, markets time-based events in the following industries: automotive, information technology, energy, chemical, pharmaceuticals, medical devices, banking, tax and sports hospitality. This department is of big importance for the company since it makes around ¼ of the annual income. With suitable improvements and the help of the modern technologies and tools on the market, it has a potential to grow into an even more powerful element of the company. The marketing activities and processes of the company will be analyzed and modified in this thesis in order to leverage the full potential of the marketing department.

The purpose of the thesis is to contribute to understanding how a company can improve the marketing process, especially in regards to efficiency of the process in general, acquiring and building relationships with customers and better usage of the company marketing data. Research question: How can the selected company improve its marketing process?

The goals are the following:

- to prepare a literature review and better understand the benefits of process modelling as a crucial part for improving business processes in a department,

- to prepare an AS-IS model of the existing marketing and research process in the organization,

- to analyze the process in detail and identify main areas for improvement in different parts of the process

- to present and propose to the selected company ways to improve their marketing and research process

- to analyze how the company can implement a CRM software tool

The research method of the thesis will consist of two parts: theoretical and empirical. The theoretical part will include a literature review and analysis of relevant and reliable academic units of literature such as: basic and methodological textbooks in the field and quality scientific articles and papers, in order to gather a deeper knowledge of the topic. I will provide explanation of the importance of business process management as a way for improving processes in a company and also of its main concepts and benefits.

In the empirical part of the research, I will analyze the existing marketing process in order to identify potential areas for improvement. First, I will conduct interviews with 3-4 key representatives from the marketing department, including the marketing and research director, the research manager and other crucial participants in the marketing process. Next, I will carefully and directly observe the process in real-time. The intent is to get a clear and detailed picture of the existing process which would enable to establish a proper basis for further analysis and identification of improvements. Finally, I will perform process modelling of the current marketing process and represent it accurately in an AS-IS model in order to serve as a basis for a detailed analysis and further enhancement identification in a TO-BE model.

The work will consist of the following parts: a literature review of the topic including definitions, concepts and explanations, a description of the specific case of the company, research and analysis of the problem, identifying possible improvements in the process, discussion with regards to the implementation of the changes, and conclusion together with suggestions for future research.

1 LITERATURE REVIEW

This section represents the theoretical part of the thesis and includes a broad definition of Business Process Management, definition of a business process together with its elements, an overview of the BPM lifecycle and an introduction to business process modelling. Next, a definition of digitalization and how it is connected to BPM is presented. After that, this section defines marketing, digital marketing and Customer Relationship Management (CRM), with further elaborating on the types of CRM, CRM software and the CRM implementation process.

1.1 Business Process Management

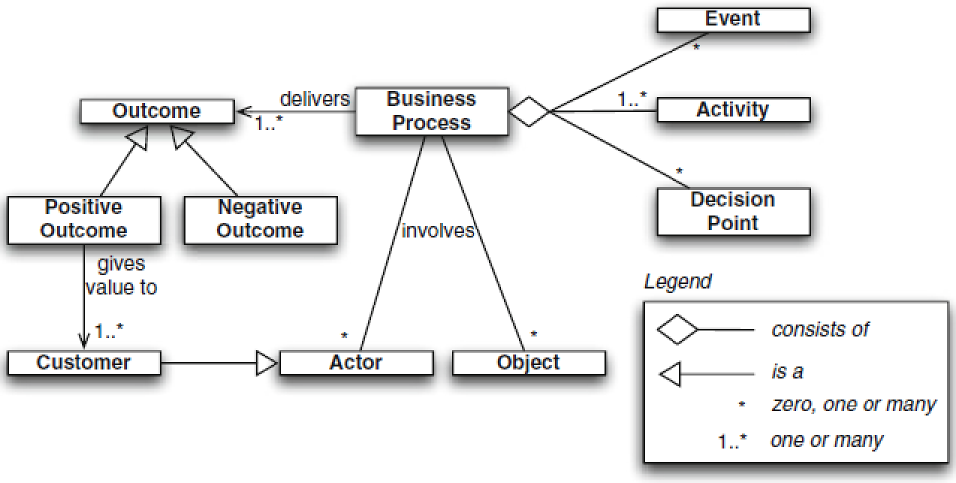
1.1.1 Definition of Business Process Management

As mentioned before, Business Process Management is all about making sure that the work in an organization is performed in such a way that the outcomes are consistent and the company maximally exploits the opportunities for improvement (Dumas, La Rosa, Mendling & Reijers, 2018). This does not mean that BPM is used to make sure that the processes are improved and then just remain that way. The main objective is to assess the processes as they are (AS-IS), in order to become fully aware of certain troublesome parts of those processes, for the purpose of continually fixing and re-designing them (Van Den Bergh, Thijs & Viaene, 2014).

Another definition of BPM is the one by Kale that defines BPM as “the activities performed by enterprises to design (capture processes and document their design in terms of process maps), model (define business processes in a computer language), execute (develop software that enables the process), monitor (track individual processes for performance measurement), and optimize (retrieve process performance for improvement) operational business processes by using a combination of models, methods, techniques, and tools” (Kale, 2016, p.235).

What is managed in BPM is the business process, which is defined as “a collection of inter-related events, activities and decision points that involve a number of actors and objects, which collectively lead to an outcome that is of value to at least one customer” (Dumas, La Rosa, Mendling & Reijers 2018, p.6). In Figure 1, all of the elements of which a business process is consisted are visually presented. The business process is consisted of events, activities and decision points, involves objects and actors, all of which produce either a poisitive or a negative outcome that transform into a certain value for the customer. Therefore, BPM consists of tools, methods and tecniques that are used for recognition, analysis, restructuring, performing and monitoring of these business processes and how they should be optimized.

Figure 1. Elements of a business process

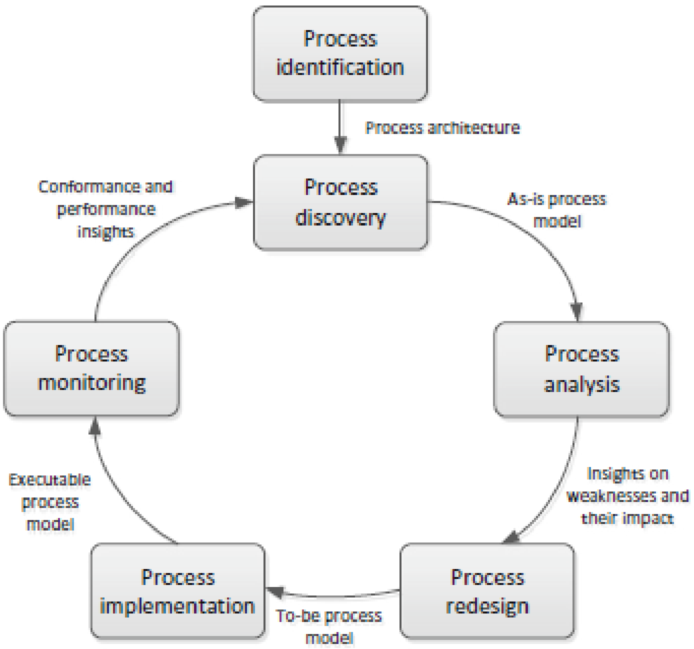


Source: Dumas, La Rosa, Mendling & Reijers (2018).

1.1.2 The BPM Lifecycle

BPM represents a continual cycle with the goal of process improvement. The circular flow of BPM includes several phases in which the output of each phase is actually an input for the following phase in order to adapt the process to match the needs of the customer.

Figure 2. The BPM Lifecycle



Source: Dumas, La Rosa, Mendling & Reijers (2018).

As seen in Figure 2, the phases of the BPM lifecycle are:

- Process Identification

Since for most companies, it is not possible or cost-efficient to analyze and improve all processes and parts of the organization, it is important to direct the attention towards those parts that are of most relevance for the company as a whole. That is the reason why, during this phase, one or more processes that are either of great strategic importance to the company or are faced with some critical problem or issue are identified. By looking at the overall process architecture i.e. all of the processes in the organization and their relations, a selection of prioritized process or processes to improve is made. Additionally, by assesing process performance dimensions, key performance indicators (KPIs) are defined for each process in order to measure their performance (Dumas, La Rosa, Mendling & Reijers, 2018).

- Process Discovery

In this stage, the relevant process or relevant processes are recorded, described and modelled in one on more AS-IS process models, representing the contemporary state in which the processes are at the moment. They are the output of ths lifecycle phase. The goal of the creation of these models is to answer the following questions that are crucial for understanding the process, as implied by Laguna and Marklund (2018):

-What does the process do? (What activities it is consisted of? What is the purpose of the process?)

-How good (or bad) is the current process performance? (Which parts of the process perform and which don't? Which are the ones that should be changed?)

-What are the most important issues in the process that contribute to the process performance?

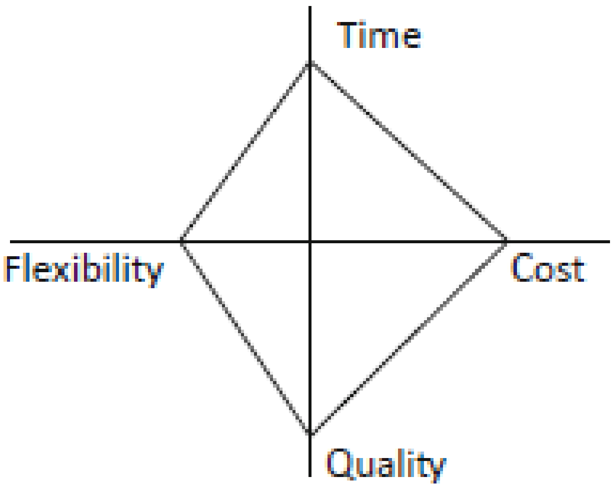
- Process Analysis

Using the output from the previous phase, that is the AS-IS model, this phase is used to refine the understanding of the process, to establish potential points where the process should be improved in order to align with the business goals and prioritize these issues by impact and effort for sorting them out (Von Rosing, Von Scheel & Scheer, 2014).

- Process Improvement / Process Redisgn

In the phase of process improvement or process redesign, for all of the issues stated in the previous phase, potential changes or solutions are identified, analyzed, compared and tested. The best change options are then assembled into a redesigned process and modelled in a TO-BE process, which represents the output of this phase. The redesigning of the process here is purposeful and intended, in order to make a meaningful change in the business process. When redesigning a process, there should be a clear idea of what should be achieved, such as: decreasing cost, reducing time, increasing flexibility or improving quality. Figure 3 shows the four dimensions visuallized in a framework called Devil's Quadrangle, that has the purpose of showing that it is almost impossible for a process to be improved in all four dimensions and that improving the process in one dimension, has an impact on another dimesion (Dumas, La Rosa, Mendling & Reijers, 2018).

Figure 3. Devil's Quadrangle



Source: Dumas, La Rosa, Mendling & Reijers (2018).

- Process Implementation

During the implementation phase, the changes that are defined and established as needed are implemented and executed. This means that the process is modified in a way that it matches the desired TO-BE model, which is the output from the previous phase. The alterations include changing the way people perform their work and also enhancements in the IT infrastructure and systems, leading to automation of part or all activities in the process (Dumas, La Rosa, Mendling & Reijers, 2018).

- Process Monitoring

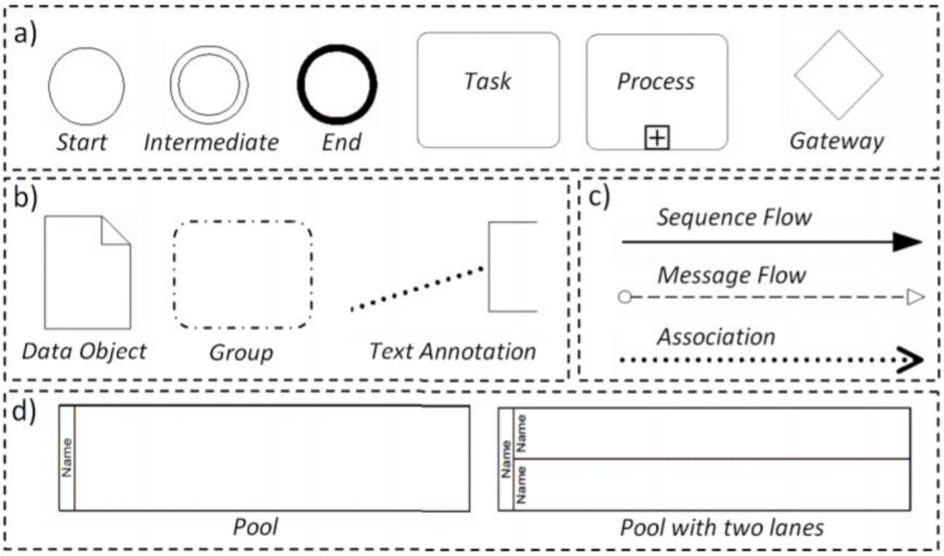
The process monitoring phase is the phase in which data is collected about the actual performance of the implemented process. Simply put, it should answer the question: “Are the improvements made in this cycle performing the way they should and are they effective?" According to Dumas, La Rosa, Mendling and Reijers, (2018): "Process monitoring is about using the data generated by the execution of a business process in order to extract insights about the actual performance of the process and to verify its conformance with respect to norms, policies, or regulations." In addition, new issues that may appear in the process, are an input for starting again the first phase of a new BPM cycle.

In recent years, tools and techniques that originate from the areas of: Internet of Things (IOT), data mining, machine learning (ML), Big Data, artificial intelligence (AI) and more others, are increasingly used in this phase of the BPM lifecycle (Szelagowski, 2018).

1.1.3 Business Process Modelling

Business process modelling is the act of creating process models of certain business processes for the purpose of understanding the process, identifying issues, preventing or resolving those issues and optimizing the process (Dumas, La Rosa, Mendling & Reijers, 2018). Process maps or models, are an established tool for analytics, management and communication of business processes, which help in understanding the business process, enable the improvement of the process or enable implementation of a new structure when renovating the process (Giaglis, 2001). The Business Process Model and Notation (BPMN) language is very often use for business process modelling since it is easily understandable for people with different knowledge background. It contains more than 100 symbols, but there are several basic ones which are most commonly used.

Figure 4. Basic BPMN symbols



Source: Ciaramella, Cimino, Lazzerini, & Marcelloni (2009).

In Figure 4, there are four groups of symbols. They are categorized as it follows:

a) flow objects: start, intermediate and end events, tasks or activities, processes and gateways;
b) artifacts: data objects, groups and text annotations for providing additional information
c) connecting objects: sequence flows, message flows and associations
d) swimlanes: pools and lanes within a pool

As stated before, BPMN represents an uncomplicated, simple and quite intuitive way of understanding business processes by nonprofessionals. Its main benefit is that it allows to relevant stakeholders that have no or little knowledge in BPMN such as: managers at different levels, process participants, software developers, IT personnel etc. to understand and get insight of the business process in question. It is also the commong language between them and people such as: business analysts, external consultants, business process managers and others who are more knowledgeable or are actually participating in the implementation and need a certain quantity of detailed information for that (Semenchuk, 2017). Some other common benefits recongnized from using BPMN are the following:

- The possibility to select and use multiple tools as a consequence of the widespread use by a large number of solution providers
- Because of its simplicity, process models can not only be understood, but they can also be created by personell in almost all levels of the organization and then enriched or enhanced by someone more experienced
- BPMN is the best known and used modelling notation, partially due to two features: exception handling and BPMN modeling of event (BPMN, n.d.)
- It heavily supports the management of the business processes
- It enables an easier and smoother communication between the stages of the previously explained stages of the BPM lifecycle: the process design stage with implementation (Heflo, n.d.)

1.2 BPM and Digitalization

In recent years, a variety of new technologies and concepts has emerged, all of which are getting a lot of attention, but almost all of them are implemented to a limited extent, and only a few have achieved a wide adoption among the companies (Vom Brocke & Schmiedel, 2015). These novelties include the concept of Industry 4.0 and 5.0 and the before mentioned digital technologies such as: IoT, AI, ML, augmented reality, deep learning, Robotic Process Automation (RPA), edge computing, then the existance of enterprise softwares such as: Enterprise resource Planning system (ERP), Customer Relationship Management (CRM) system, Business Intelligence (BI) software, Supply Chain Management (SCM) software, Human Resources Management (HRM) software and many more that are enabled by IT. Besides the potential benefits of these digital technologies, the majority of the companies have only a trivial understanding of the opportunities and impact of digital transformation. This is true especially for small and medium sized enterprises (SMEs) mainly due to their limited ability to change and limited resources (Fisccher, Imgrund, Janiesch & Winkelmann, 2020).

Digitalization is defined as exploiting digital technologies in order to alternate a business model and produce new earning opportunities and opportunities that lead to increased value. Digitalization is the process of shifting from a nondigital business to a digital one (Gartner, n.d.). In the process of digitalization, every company follows their own digitalization path. A company's digitalisation path is a set of activities or steps that the company undertakes to put into use one or more digital technologies or solutions. But the technology itself is not the final goal, it is just the instrument or tool to achieve process excellence (Martinez, 2019). That is why, it is of utter importance to note that digital or information technologies do not automatically bring competitive advantage or value by themselves. The companies should not adopt technology and automate activities just for the sake of it. The primary thing is to consider the needs of the organization and to align that technology with the processes in question and the people of the organization. This would make sure that the investment in these technologies will pay off because the focus would be to make the processes smarter and increase their efficiency, not to keep up with the trends (Van Den Bergh, Thijs & Viaene, 2014).

According to Professor Hendrik Vanmaele from Ghent University, BPM is evolving into a new BPM in which technology will still be the central driver of process inovation, but at the same time, not the most important part. In order to be successfull in this new BPM, it is required that organizations have some other capabilites and intangible assets such as: ability to succesfully execute their strategy, modularity that enables agility of the organization, ability to take into consideration and include customer needs in the processes and finally, change management as the most essential one (Van Den Bergh, Thijs & Viaene, 2014).

1.3 Marketing and Customer Relationship Management

1.3.1 Definition of Marketing

The American Marketing Association provides the following formal definition of marketing: “Marketing is the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large.” These offerings actually refer to some product or service that the company is creating.

Digital marketing as a crucial part of marketing, is a dynamic and constantly changing process which is consisted of marketing methods executed through the use of electronic devices and digital technologies (The American Marketing Association, n.d). Digital marketing today is a crucial part of and is present in all of the company's marketing activities including: public relations (PR), product development, promotions, pricing strategies, customer communication, branding, CRM etc (Heflo, 2016).

1.3.2 Definition of Customer Relationship Management

One extremely important part of marketing is Customer Relationship Management (CRM). It is defined as “a customer centric business strategy that encompasses all business models, processes, methodologies, and techniques for closing the gap between an organization’s current and potential performance in acquisition, growth, and retention of valuable customers for mutual benefit.” The main users of CRM are those using database marketing in order to increase the level of automation when interacting with their customers (Kale, 2016). Database marketing is actually the process of collecting and analyzing relevant data from multiple sources such as: emails, data warehouses, social media or CRM systems in order to build and carry out better marketing campaigns (NG Data, 2017).

CRM is a quite complex and advanced concept revolving around the idea of customer-centricity. The organizations that are customer-centric organize all of their activities, processes, and the company as a whole around the customer and his needs, rather than the product or service. This is done with the potential goals of improving operations efficiency, increasing revenues, increase customer loyalty or reduce costs related to sales, marketing or service (Chen & Popovich, 2003).

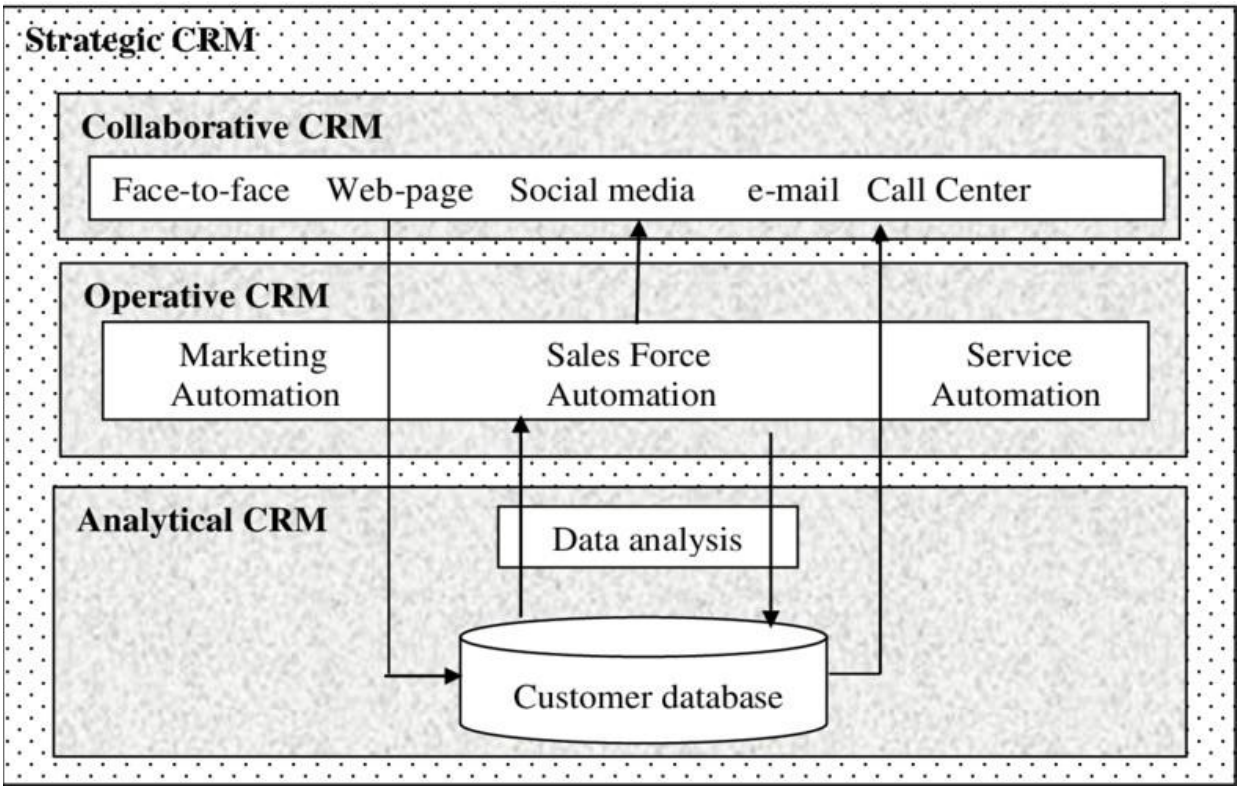
CRM as an application is quite advanced, enabling companies to improve their relationships with customers, manage them more easily, better satisfy customers’ needs and ultimately increase the value provided to customers. In order to achieve this, the company needs to revise and analyze all of the processes that create value for customers and utilize the technologies and benefits offered by CRM (Chalmeta, 2005). Through the use of CRM, companies are able to mine customer data from several touch points such as: social media, website, emails etc. and performs analysis of the customer activities. This enables for:

- Designing an exclusive and absolute view of customers
- Predicting customer buying patterns
- Understanding customer motivations and drivers
- Identifying key customers to focus marketing efforts on
- Communicating better with customers
- Tailoring products and services (Chen & Popovich, 2003)

1.3.3 Types of CRM

There are 3 main types of CRM: operational, analytical and strategic. Some authors mention a fourth type, collaborative CRM. Figure 5 visually represents these types and the relationships between them.

Figure 5. CRM types and relationships



Source: Johnson (2002).

1. Operational CRM

Operational CRM is concerned with all of the front-office applications and includes all of the processes that are directly related to creating and managing customer relationships. From the first customer touchpoints, including website, social media and email, to lead management, to the whole journey of the prospect to becoming a customer and to maintaining the relationship after they become a customer (Hicks, 2020). The main focus of operational CRM is making sales, marketing and service functions of the company more efficient and effective, mainly by: marketing automation, sales force automation and service automation. The two main goals of operational CRM are: to improve customer value and to reduce the operating costs of the company (Foss, Stone & Ekinci, 2008).

2. Analytical CRM

Analytical CRM is concerned with the technologies that enable collection, management and analysis of the customer data in order to identify and use relevant trends and insights useful for further decision making (Foss, Stone & Ekinci, 2008). Data is one of the most valuable possessions of the company since it can generate extremely useful information for decision-makers. The analytical CRM features provide the company with information such as: what are the most successful marketing campaigns and why, what are the characteristics of the prospects that most probably will turn into customers, where should the sales and marketing effort be focused, what kind of customers it is most probable to make another purchase, which actions lead to customer acquisition and so on (Hicks, 2020).

3. Strategic CRM

The main focus of strategic CRM is the customer-centric orientation of a company, therefore it is concerned with building and providing value for customers better than its competition. A company that is customer-centric has a learning organizational culture which continuously listens to the customer and adapts to his needs and requirements and also to the competitive conditions on the market (Buttle & Maklan, 2015).

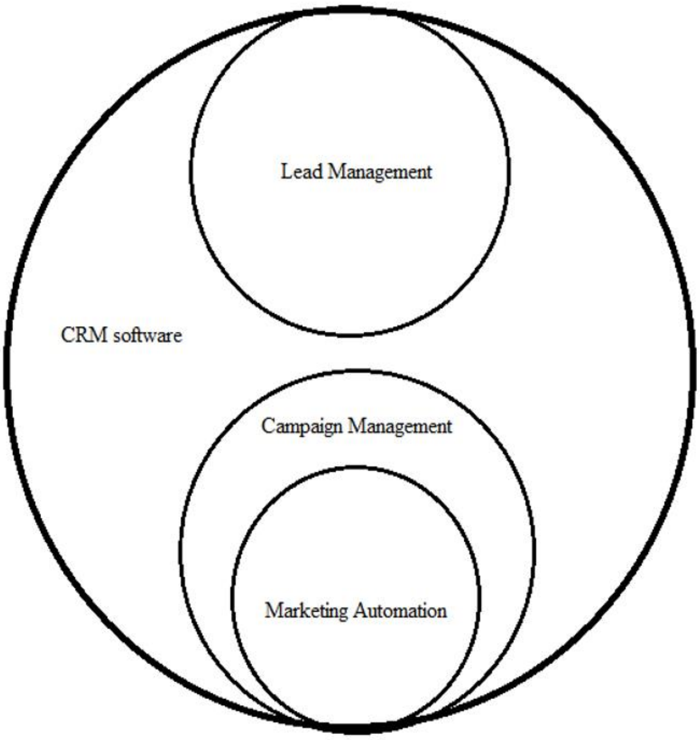
4. Collaborative CRM

The main focus of the collaborative CRM is to break down the data silos between sales, marketing and service departments. This is done through its two main functionalities: providing accurate and up-to-date data to all employees from different departments and locations and ensuring that all users have access to the information they need at the right time. Its main features are: interaction management, channel management and document management (Hicks, 2020).

1.3.4 CRM Software

A crucial part of the CRM strategy is a proper implementation and use of a CRM software, since the software itself is not enough. The software can include different features and elements, based on the needs and priorities of the user. Some of the most often used features are: marketing automation which allows for designing and controlling marketing campaigns, sales force automation mainly for B2B companies, reporting on all CRM activities, automation of customer support, contact center support and much more. One piece of the CRM software useful for a marketing department is lead management. It includes several sub-processes which are supported by analytics: generating leads, refining the leads that will be prioritized and invested in, developing a relationship with the lead and providing high levels of service and support and then tracking the process of conversion of the leads into customers of the company (Buttle & Maklan, 2015). Other features or applications of a CRM software useful for the marketing department include marketing automation and campaign management. Marketing automation includes the use of IT in order to support marketing specialists, potentially delivering to them the following benefits: more streamlined and cost-efficient marketing processes, greater productivity and effectiveness, better accountability for expenditure based on almost real-time data analysis, real-time and flexible marketing for better use of opportunities, better marketing intelligence and improved customer experience and engagement. On the other hand, campaign management is an application that enables the selection of prospects and customers in different stages of the customer lifecycle for customized communication based on data analysis and interpetation (Buttle & Maklan, 2015). These functions are presented in Figure 6.

Figure 6. Marketing features of a CRM software



Source: Own Work.

Some of the CRM software systems on the market that are at one's disposal, both paid or free, are Salesforce, Zoho, SAP, Bitrix24, Pipedrive, SugarCRM, Microsoft Dynamics, Nutshell, Aptivo and so on (Kingsnorth, 2016).

The main benefits that are generally expected from using a CRM software are the following:

- Reliable reports using error-free, analyzed and actionable data, enhanced by AI
- Dashboards to visually present data relevant for each user (eg. click-through rates of a marketing campaign for the marketing manager or number of calls that resulted in a sale for the sales manager)
- Better and personalized automated messaging
- Proactive service for satisfying the customer needs more proactively
- Automation that leads to greater efficiency
- Simpler and easier collaboration across teams (Salesforce, n.d)

In an attempt to analyze the operational benefits that CRM system implementation produces for companies, Haislip and Richardson, in their paper “The effect of Customer Relationship Management Systems on Firm Performance”, found that those companies that implemented the systems enhanced their operational performance and efficiency, had better accounts receivable collectability and better prediction of their income. These positive effects are manifested by increased sales and cash flows, more exact prediction of management income, reduction of operating income margin and some other similar improvements.

1.3.5 CRM Implementation

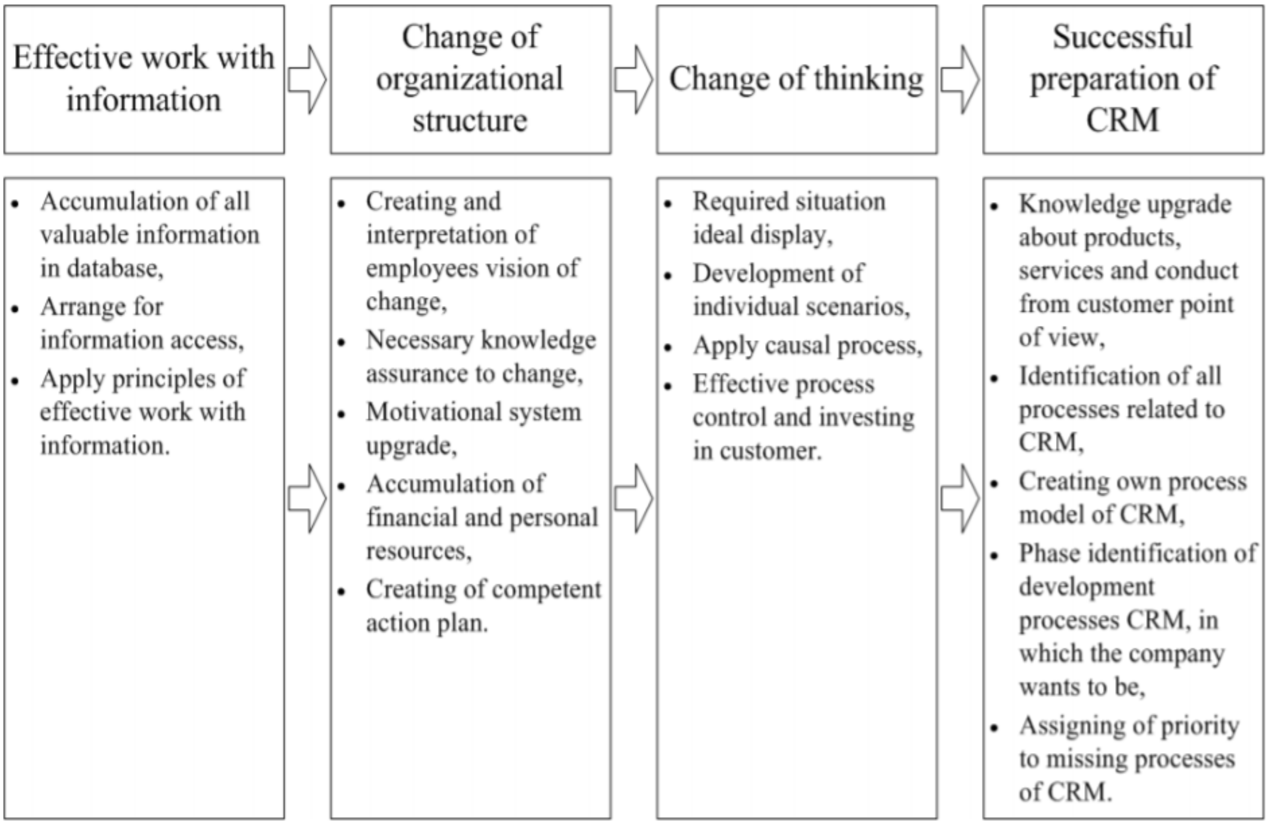
In order for a CRM project execution to be successful, what companies need to do is to assess how the CRM would fit and integrate with the company strategy, what are the current CRM capabilities and potential of the company and what is the business reason for implementing CRM in the first place (Hguyen, Sherif & Newby, 2007). The implementation of CRM is a quite challenging process in which companies need to first plan how to carefully combine and integrate several different inputs such as: physical resources (hardware and technology), information (databases) and organizational resources including the culture of the company in order to strengthen relationships with customers and increase their competitive advantage (Foss, Stone & Ekinci, 2008). Before diving into the CRM implementation process, it should be mentioned that the human factor, or the people of the organization as one of the key dimensions of CRM, together with processes and technology, play an extremely important role and should be managed, communicated with and prepared for the implementation in the right way. This procedure is presented in Figure 7 and consists of 4 phases, with several tasks inside:

- Managing the existing information, its efficient use and identifying the information access needs
- Making changes in organizational structure- preparing and adjusting the structure for the CRM implementation, including ensuring that employees understand the

need for change, that they have the necessary knowledge for the change and motivating them to support the change

- Making changes in the way of thinking
- Preparing for CRM implementation, including the steps that will be covered in this thesis: identifying and modelling processes that will be affected by the use of CRM software and defining the required functionalities (Lendel & Kubina, 2008)

Figure 7. Procedure for CRM implementation: human factor

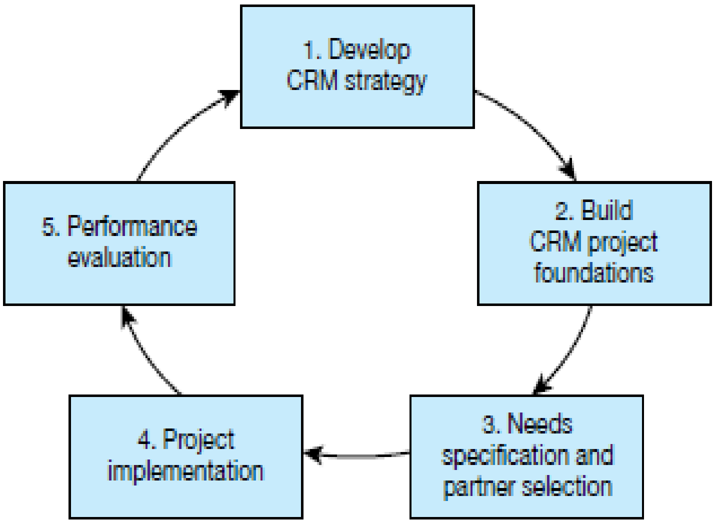


Source: Lendel & Kubina (2008).

CRM projects implementation may differ greatly in terms of scope, therefore not all projects follow the same steps and phases, but the most general phases for implementation, as suggested by Buttle & Maklan (2015) are presented in Figure 8.

The first phase is developing a CRM strategy. This includes performing a situation analysis with the goal of assessing the market segments that are served, offers and channels in order to identify the strengths and weaknesses of the company in the current state. Next, the company needs to make sure that all of the stakeholders, including management and employees from all departments have a shared and common understanding of CRM. Then, a CRM vision together with goals and objectives need to be set.

Figure 8. The five-step implementation process



Source: Buttle & Maklan (2015).

This will give a direction to the CRM efforts and define what it is that the company wants to achieve. This will then help in identifying all of the changes required in terms of: people, technology, processes and other organizational changes. Finally, a business case including all of the costs and benefits of the project should be presented to the board of the company and agreed upon.

The second phase is building solid foundations for the CRM project execution. This phase includes establishing governance structures which is actually determining the roles and responsibilities of all involved such as: CRM consultants, software developers, project managers, system implementers and so on. Next, a lot of attention needs to be paid to activities related to change management. Organizational culture affects CRM success, so it must be evaluated and changed if needed in order to adjust it for a successful CRM implementation and use. In this phase, project management needs should be identified, as well as critical success factors (CSFs). CSFs are defined as the characteristics and features that affect the business outcomes greatly. Finally, the company should identify and assess the potential risks from failure and develop risk-mitigation plans accordingly.

The phase 3 of the CRM implementation starts with recognizing the business processes that need reengineering. In this part, process mapping is usually done in order to better understand, asses the processes and to find out which processes can and should be improved. Next, the data that is readily available and the data that is needed for CRM purposes are compared and a gap analysis is performed. After defining the data requirements, the next step is to decide whether the company will buy, build or lease a CRM software. When this is decided, the company makes a list of potential CRM software vendors and writes a detailed request for proposal (RFP) and sends it to them. The vendors reply with their offers and after some negotiation, the company chooses a CRM partner.

After the third phase is finished, the project can be implemented. Together with the CRM partner chosen in the previous phase, the company needs to revise and make adjustments to the previously made project plan. Then, the software is customized if needed with the help of developers and a prototype of the software is created. Then it is tested, modified and finally, it is rolled out for organization-wide use.

In the final phase, the CRM project is executed and the CRM software is implemented and already in use. The company now usually wants to see whether the software has performed as well as it was planned and supposed to. This is done by evaluating the project outcomes and the business outcomes. Project outcomes focus on the success of the project in terms of time and budget of the project itself, while evaluation of the business outcomes refers to the business results that were supposed to be achieved in accordance to the CRM vision and goals (Buttle & Maklan, 2015).

2 RESEARCH METHODOLOGY

2.1 Description of the Company

BOS is a medium-sized, B2B company, founded in 2012. It is headquartered in Central Europe and employs around 100 employees in 3 locations. The headquarter office consists of the production department, counting around 10 employees, the second office includes sales and marketing and research department and the third one is consisted only of a sales department. The overall number of the sales agents in both locations is around 80. The marketing department, which is actually a name for a department that consists of two interdependent parts, marketing and research, counts 8 employees: 5 in research, 2 in marketing, a research manager and a marketing and research director.

The main activity of the company is to produce and organize business conferences in which representatives from different companies are gathered to achieve mutual benefit. The events are carefully created, based on market analysis and interviews with industry professionals in order to be truly meaningful and filled with topics concerning up-to date issues in the specific area. Up until the beginning of 2020, when the COVID-19 pandemic started, the conferences were held on physical locations, all over Europe. In order to adapt to the newly occurred situation, starting from March 2020, the conferences are executed virtually, on a platform completely owned by BOS. This broadens the possibility for attendees from other continents to also participate and share information and experiences, to debate and network.

2.2 Description of the Case

The leadership of the company BOS, ever since its establishment, up until around 1 year ago, heavily focused on the sales departments as the main source of the company's income. The main efforts in every way were directed towards this process in a constant attempt to improve it, and doing it successfully. On the other hand, the marketing department has been neglected and was struggling to keep up. Today, the leadership of the company has become more aware of the state of the department and the need for a revolutionary change in its functioning. Also, the company management is on a good path to understand and acknowledge the potential of the new digital technologies that are present on the market and are used by other companies, including their competitors.

In the past year, the marketing department has become an essential part of the company since it makes around ¼ of the annual income. It is undeniable that the department and the whole research and marketing process within it has been through tremendous improvement efforts and has done a big step forward compared to its beginnings. But still, despite all of that, the company's management believes that the department still isn't leveraging its full potential. With suitable and well-thought changes and adjustments and the help of the modern technologies and tools on the market, it has a potential to become even better and more powerful part of the company, with the goal of earning up to ½ of the company income.

I work in the company as a senior research specialist, performing an essential part of the marketing process in the organization BOS. I am doing research of the markets for different industries, identifying and targeting relevant companies and preparing the database that consists of companies and leads according to the needs of the particular case. My job position mainly includes: deeply studying the industry, issues and topics of the conferences assigned to me, doing company research and examination, extracting leads from the selected companies, organizing the leads and preparing an email list for the marketing campaign. In the course of completing my everyday tasks, I can easily identify activities with which I struggle or that are outdated and can and should be suitably replaced or enhanced.

2.3 Research Design

For the purpose of accurately answering the main research question of this thesis, which is: How can the selected company improve its marketing process, in the empirical part of the study, the following research methods are used:

- In depth interviews

- Semi-structured interviews

- Observation
- Process modelling

All of these methods were explained to and discussed with the top management of the company during the planning process of this case study and at the end of the execution of the methods, the results were reviewed and approved. The main participants from the selected department were also introduced to the general idea, the purpose and goals of this project. The research was conducted in the company office and all of the data was collected between March and August, 2021.

2.3.1 Interviews

Two types of interviews were performed:

- In depth interviews with relevant employees

The interview method of collecting data is consisted of presenting certain oral-verbal stimuli by the interviewer and getting a reply with reference to oral-verbal responses by the interviewees. The interviews in question are personal interviews, a method in which the interviewer asks questions generally in a face-to-face contact to the other person. This method is chosen due to the fact that a lot of details about the functioning of the company in general and especially about the marketing process were needed and this information could be best obtained by respondents such as important specialists, managers and directors. This method also enlables collecting suplementary information and secures more spontaneous and sincere reactions by the respondents. Although more time-consuming compared to the questionnaire approach, this method usually generates more valuable and accurate results (Kothari, 2009). In-depth interviews were conducted with 4 representatives: the marketing and research director, the research manager, a research specialist and a marketing specialist. The duration of the interviews varies from 30 minutes to 2 hours. Follow up interviews were also performed in order to clarify a few more sensitive points.

- Semi-structured interviews with other employees on lower positions, directly included in the process

In addition to the in-depth interviews of the most relevant participants in the marketing process in terms of their access to information and authority they possess, several semi-structured and more flexible interviews were performed with other employees. This was done in order to get insights about the activities and the issues from the employees which are actually performing the activities that are going to be modelled and analyzed.

2.3.2 Observation

For gathering additional information, it was easily possible because of my everyday participation in the research process, to also perform an observation of the participants and the actual work performed. This method was considered to be suitable due to the fact that the sample observed is quite small and the information gathered represents the actual and current events that are happening (Kothari, 2009).

2.3.3 Modelling the Current Situation (AS-IS Model)

- Creation of an AS-IS model of the current process

Creating a model or a map of the current business process was the next logical step since a process that is not understood and analyzed cannot be improved. According to Hammer and Champy (1993), understanding a process is different than analyzing it in the level of detail of all business process elements which are documented and processed. They imply that a process should be understood well enough in order to have the intuition and knowledge to redesign and improve it, without going into excessive amount of details. This doesn’t mean that process analysis is unnecessary or a mistake, it simply means that overanalyzing and becoming extremely familiar with a process should be avoided in order to prevent the inability of thinking of new, better ways of performing that process.

The business process model or process map, that was created follows one of the basic rules which is to keep it as simple as possible, while at the same time capturing all of the basic relevant details, making it easily understood and followed by all stakeholders regardless of their knowledge background. The AS-IS model, as a visual representation of the current marketing process was created in the form of a diagram, using the BPMN process modelling technique in the application Bizagi Modeler. The BPMN diagrams consist of simple symbols for visualizing the process which are sorted in 4 groups: flow objects such as: activities, events and gateways, connecting objects which are: sequence and message flows, and associations, artefacts and swim lanes (Bizagi, n.d.). Based on the analysis of the AS-IS model, a TO-BE model of the suggested process is created as well, including the suggested changes of the functioning of the department.

3 ANALYSIS AND SUGGESTIONS FOR IMPROVEMENT

3.1 Process Discovery

3.1.1 Roles and responsibilities of the participants in the business process

In Table 1, the activities for which each participant in the marketing and research process is responsible are listed. These employees are the ones who are directly involved in the whole process, contributing to the final results of the department.

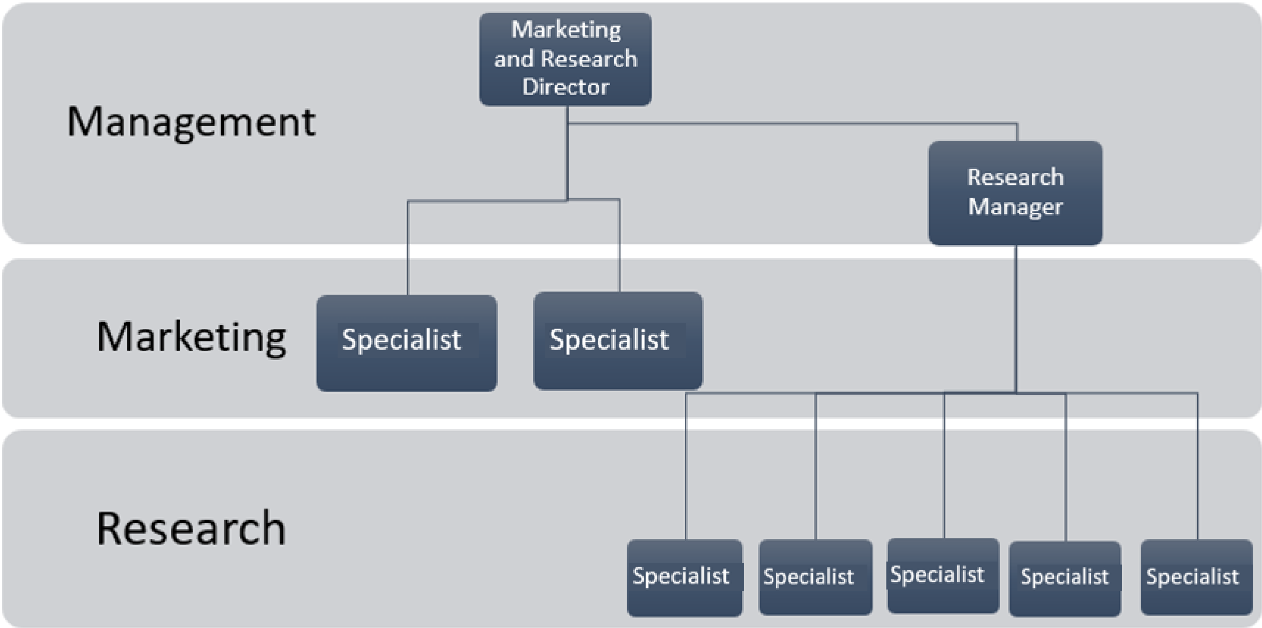
Table 1. Responsibilities of each role in the marketing and research process

TYPE OF ROLE	NO. OF EMPLOYEES IN MARKETING	RESPONSIBILITIES
MANAGEMENT	**1 Marketing and Research Director**	Coordinating the department as a whole, lining-up the campaigns with the marketeers, coordinating the research efforts together with the research manager, approving fires and new hires
	1 Research Manager	Managing the research efforts in terms of number of leads and deadlines, leading trainings of new and current research specialists, organizing Excel files, performing interviews with potential employees, preparing bonuses for employees
MARKETING	**2 Marketing Specialists**	Sending email campaigns and email campaign reminders, communicating with prospects via email and closing deals, creating banners and videos of conference speakers, posting banners and videos on LinkedIn and Twitter, creating and sending credentials to conference participants
RESEARCH	**5 Research Specialists**	Performing in-depth analysis of the given industry, composing a company list based on research, extracting relevant leads from LinkedIn (lead generation), composing Excel files with leads' information, preparing lists for email marketing campaign
IT	**1**	Ensuring all parts of IT infrastructure works, fixing day-to-day issues

Source: Own work.

In Figure 9, the current organizational structure of the department, including the management of the department (marketing and research director and research manager), the two marketing specialists and the five research specialists is presented.

Figure 9. Current organizational structure of the department



Source: Own Work.

3.1.2 AS-IS model

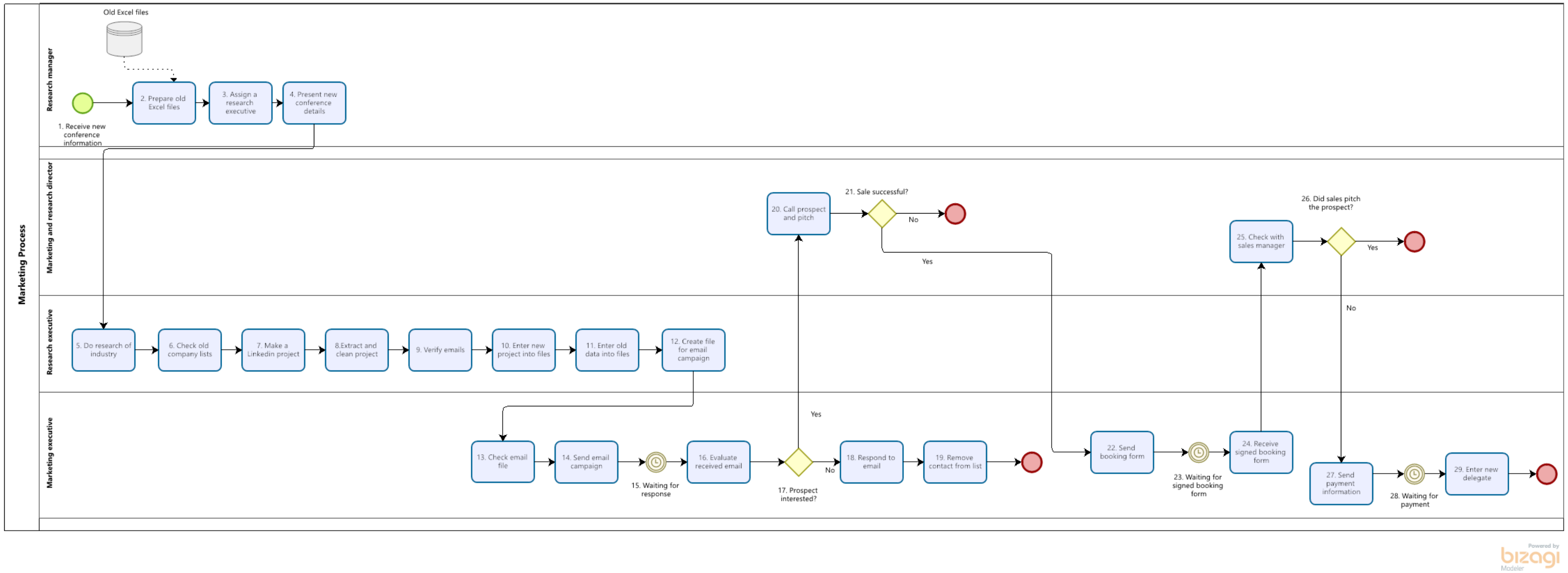
Figure 10 graphically represents the way in which the marketing process is currently being performed. The process is modelled in such a way that it doesn't focus extensively on details, but its main purpose is to show the most basic activities and logic behind them. This simplicity leads to easier and better understanding of the essential parts of the process and enabling for more straightforward identification of the most problematic parts. The elements of the process model are explained in more detail in the following section.

3.1.3 Elements in the business process

Preparing for a new conference (1-4)

First, the research manager receives information about new conferences that should be worked on. Information includes: starting date, target industry, target location, target companies and target job titles for End User companies and for Solution Provider

Figure 10. Marketing Process model



Source: Own Work

companies (Sponsors). The research manager extracts from their computer, various documents such as: company lists, old email lists, LinkedIn formulas and delegate lists and merges them into 4 documents. The research manager verifies the old email list by sending the emails from numerous AOL accounts. After the emails are verified, the manager assigns one researcher to the conference and presents all the requirements and conference details to that employee. The old conference documents are given to the researcher for further use.

Starting a new conference (5-6)

When the researcher gets the conference details in a document called Research Brief, he/she can execute a topic and industry research in order to get more familiar with the work that should be done in the following 6-8 weeks, which is the period of working on one conference by the research team. From the received documents, the researcher checks all of the companies in the company list to make sure they are still relevant and existent. The researcher also searches for new companies as an addition to the old list to ensure new, innovative and relevant companies are included.

Making projects (7-8)

The researcher makes a LinkedIn project using LinkedIn Recruiter, which is actually a tool used by recruiters for talent and candidate searching that fulfill certain criteria, in our case according to the formula specific to the conference that is worked on. The formula includes the relevant job titles, while filters such as: location, company and sometimes additional keywords are also selected. Due to LinkedIn limitations, one project reaches to only 1000 leads, but can include any number of companies. There is only one Premium LinkedIn account for all 5 researchers and it costs $8,999 per year. In practice, this account allows for only 4 projects per day, while the research team needs at least 10. When a project is made on LinkedIn, the whole project, page by page is copied into a free online text manipulation tool called Text Mechanic. There, using pre-made so-called formulas, unneccesary lines and spaces are cleaned from the text. That text is further transferred into an Excel file where it is manually structured to show: contact name, country, job title and company. This list is then transferred into another Excel file that has preinserted formulas for creating different email combinations. In this file, the researcher manually removes any unnecessary signs and letters from the contacts. Next, the researcher searches for the company's domain on the Internet and the most probable combination for that domain and puts them in the file. As an alternative solution, in order to be able to make more projects on LinkedIn, instead of actually saving the leads in a project, they are directly copied into Text Mechanic. The process then continues as described.

Verifying emails (9)

When the emails are created, they need to be verified. The first step is to verify emails using a tool called Quick Email Verification. This tool is paid, with different pricing options available according to the number of emails that can be verified daily (how many credits the company needs). The company BOS pays $160 monthly for 5000K credits, which are not sufficient for the amount of work done by the research team. This tool allows for uploading whole email lists and marking them as correct or incorrect (safe to send or not) using two colors: green and red. Some of the domains are marked with yellow color and are not verified using this tool, but needs to be verified by sending those mails from an AOL account. Each researcher has 4-8 accounts on their computer for this purpose. 99 emails are sent every hour with maximum of 5 groups of emails or 495 emails per day per account. The emails that get some kind of response or do not get a response are considered valid, and those that get a response “Not delivered” are considered incorrect.

Merging old and new data and preparing it for email campaign (10-13)

The finished project is entered into an Excel file called a Marketing File. The data about those companies in the project is extracted from the old email lists and is also put into the Marketing File. The researcher manually removes the duplicates from the file.

Every Monday, the accumulated leads from the whole week are put into a CSV file and again, manually checked for missing values, errors, duplicates and redundancies. This way, the file is prepared for marketing to send a campaign to those prospects. When the file is received by the marketing specialist, it is again checked against the previous mentioned issues.

Sending email campaign (14)

Every Monday of the week, the marketing specialist schedules the campaigns so that they start being sent on Tuesday at 3AM, using the platform Wizz Mail. Due to the large quantity of emails to be sent, the campaigns are sent from several different servers. There is only one, general email that is sent to all of the leads, containing the same subject line, the same body of the email and the same attachment which is the conference agenda.

Communication with prospects (15-20)

After the campaigns are sent, the marketing specialists are waiting for an email respond by some of the prospects. As soon as the respond comes, they evaluate the email content to determine whether the prospect is interested in the conference or just wants his email to be removed from the contact list and wishes not to be contacted ever again. If the, respond is negative, like in the second case, the marketing specialist removes the email from the

contact list and the communication is finished. If the answer is positive i.e. the respondent is interested in the conference, the marketing and research director calls the person directly on the phone, explains everything about the offer in the email and actually tries to sell the conference. If the communication does not bring a new delegate, it ends.

Closing a deal (21-29)

If the prospect decides to book a seat for the conference, the marketing specialist sends him a filled booking form that needs to be signed. When the signed booking form is received, the marketing and research director must check with the sales managers whether a sales agent has pitched that contact in the last 5 working days. If yes, the deal is considered to be a deal of the sales department and the process ends here. If not, the marketing specialist sends to the customer payment details and after the customer has paid, he is entered into the conference delegate list.

3.2 Process Analysis

Based on the results of the in-depth and semi-structured interviews and results obtained using the observation method, several main issues were identified in the marketing (and research) process. They can be divided in two parts: issues in the research and issues in the marketing part of the process.

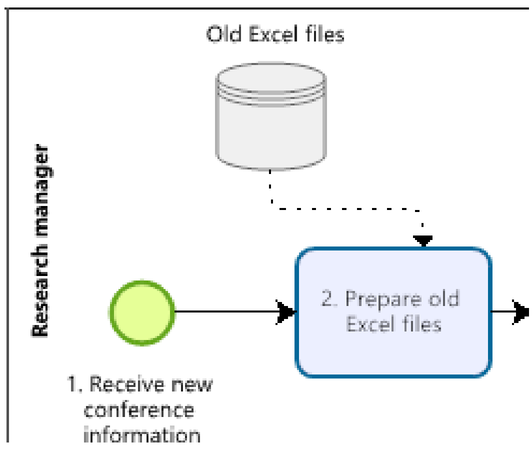
3.2.1 Research

In Figure 11, the first issue in the process is identified. The research manager needs to go through more than 20 old Excel files, from previous years for the same conference, since most of the conferences are organized annually. This needs to be done for 12 conferences in 8-12 weeks. As a result of not having a centralized, structured and up-to date database, the same work is done manually by the research manager numerous times and represents only a short-term solution to the problem.

In the activities 10 and 11, the research specialist needs to merge the old and the new data and manually check for duplicates and mistakes in the old data. This step is done several times during the day and numerous times throughout the time period in which the conference is being worked on. All in all, too many activities are done manually, leading to longer cycle time and decreased efficiency.

Another issue identified in the research process is the verification of the composed emails. The research specialists spend most of their time verifying the emails on the before mentioned tools. Furthermore, due to the limitations of the tools Quick Email Verification and AOL, the emails that are categorized as “valid” at the end of the week are not always actually valid. This leads to a much bigger problem later in the process when the email campaigns are sent. This issue will be explained below, in the marketing section of the process analysis.

Figure 11. Research issue no.1



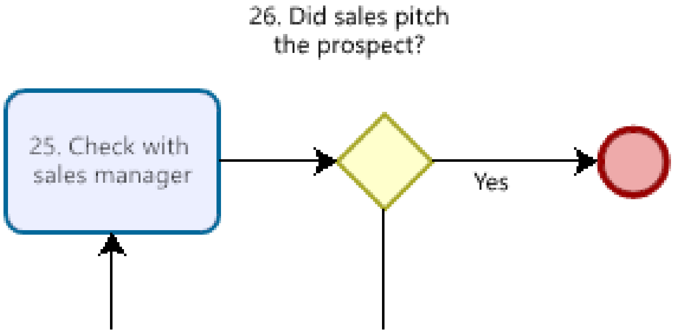
Source: Own Work.

3.2.2 Marketing

One major issue identified in the marketing process is related to the sending of the email campaign. Due to the large volume of leads, this activity is done from several different servers. Because of the abovementioned problem with the validity of the emails, the deliverability rate is not as high as it should be.

In addition, because of the fact that most of the companies are still working from home, they have increased the security and protection of their data, so the emails are not being delivered to them. As a result, the reputation of BOS's servers is lowered, resulting in disruption in the department's functioning. As a consequence from the low delivery rate, the response rate becomes lower, leading to inability of the department to reach its targets and goals.

Figure 12. Marketing issue no.2



Source: Own Work.

Another issue that lowers the efficiency of the marketing process is the part of the process shown in Figure 12. The marketing and research director is constantly checking with the sales managers whether they have pitched the same prospect. The sales department has their own way of registering and keeping track of their daily contacts with prospects, which is unknown to the marketing department. This decentralized way of keeping data in the company often leads to tensions and issues between the sales and the marketing department, but in some cases also leads to mistakes that hurt the reputation of the company in the eyes of the customer and lowers the customer service in general.

3.2.3 Marketing and Research

The current structure of the department as a whole is not delivering the desired outputs, as a result of two main reasons. First, the marketing specialists and the research specialists have no direct communication at all, even though they are all working on the same conferences. The research e specialists are constantly repeating the same tasks of generating 80% of the same leads that already exist and do not get any feedback about what works and what doesn't from the marketing specialists. All of the communication between these two parts of the department are going through the research manager and the marketing and research director, which is reducing the accuracy of the information that is passed and the flexibility of the department as a whole. The second reason is the fact that the management of the department is not knowledgeable of or experienced in marketing as a practice or open for suggestions for improvement by their employees.

3.3 Process Improvement

In the following part, as a result of the identified issues in the previous section, several

opportunities and suggestions for improvement are presented and explained. These issues were identified as critical points, based on the process data gathered through the interviews and the observation and on the analysis of the AS-IS model. These points are:

- Implementation of a CRM concept, with focus on a CRM software
- Improvement of the organizational structure of the department
- Other organizational changes

3.3.1 Implementation of a CRM Software

AS-IS: At the start of each conference, the research manager goes through numerous Excel files in order to merge them into one. The data in these files is often not valid, there are missing values, duplicates and stale data. Most of the Excel files are too big to be manipulated and often crash. These large lists of so-called leads, often contain people who are not actually relevant due to the extensive focus on the quantity of the leads and the size of the lists. In an attempt to generate as many leads as possible and by verificating them on the tools that are used, the research specialists repeatedly create low-quality lists of leads and give them to the marketing specialists.

The marketing specialists send numerous email campaigns to these leads that might even be inexistant and a huge portion of the leads do not get the emails, get them in spam or the emails bounce back, causing damage to the servers. The emails that are sent are universal for all of the prospects and are not inviting at all. This leads to low server reputation, low delivery rate and low response rate. When the reputation is lowered and the servers are not functioning well, this affects the department and also the whole company.

TO-BE: The first step is to have all customer and prospect data into a single, centralized location. A database is required so that the marketing department can record useful customer data including: name, company, country, job title, contact information, past purchases and transactions, customer preferences and so on. In one company, data can be collected and stored in several separate areas or departments. The data architecture shows the location and the way in which data is stored and the data model represents the type, meaning and use of that data. When customer data is integrated from several sources, it is possible to have one absolute and consolidated view of the customers. (Peelen & Beltman, 2013) It would be best if the company BOS implements an ERP system in which data will be stored and integrate it with the CRM software. This way, data about customers and prospects from both sales and marketing department will be readily available for the everyday efficient functioning of both departments.

The CRM software, with proper implementation and use, will help the department eliminate the several activities related to extracting data from many different sources done by the research manager at the start of every conference. In addition, it will eliminate the problem of low server rate because of sending a huge quantity of invalid emails and emails in general, since the focus will be on the quality of the carefully chosen, relevant leads.

To sum up, with the use of a CRM software, the marketing department would automate part of the marketing process, but at the same time the approach used with the prospects and customers would be more personalized, focusing on the quality rather than the quantity of the leads i.e. prospects. This can be achieved with CRM software functions such as: marketing automation, campaign and lead management. According to Buttle & Maklan, the crucial success factors in direct mail campaigns, that could be delivered with the help of automated processes are: the quality of the lists, the creative implementation, the proposition and the right timing (Buttle & Maklan, 2015). These features should help the marketing specialists to build better relationships with the company's customers. By prioritizing the quality of the leads and their proper management with the lead management feature, shifting the focus towards the customer and his unique, personal needs with campaign management and automation of some of the tasks in the whole process, will most certainly solve more than one issue in the marketing process of the company BOS.

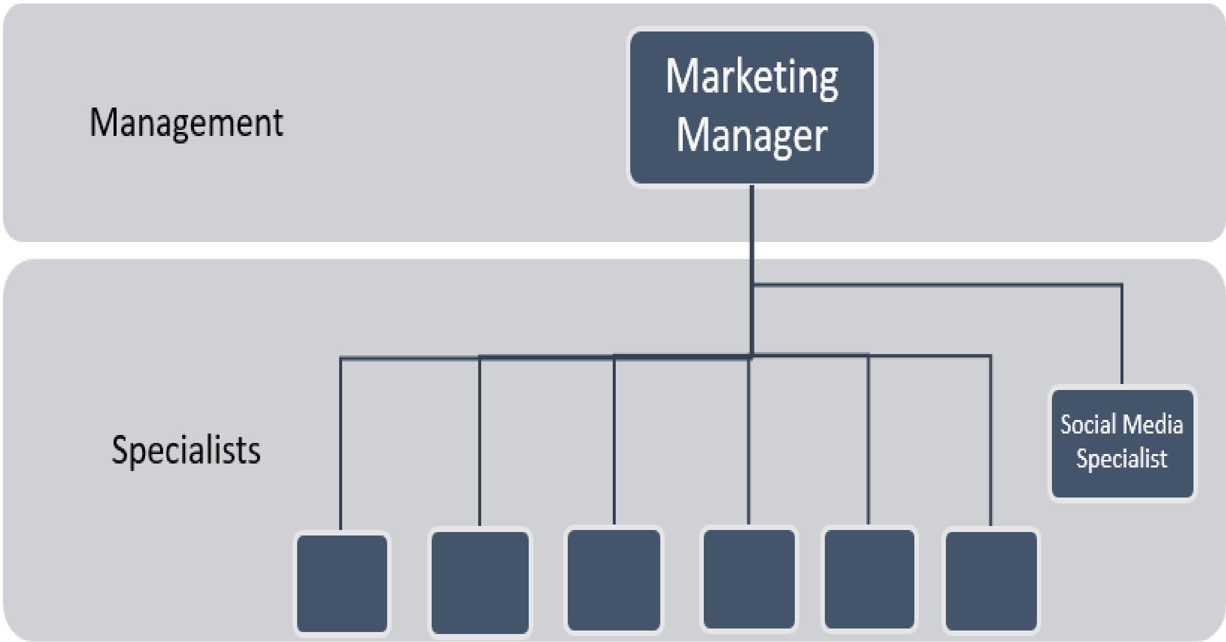
This section explains only the implementation of a CRM software in regards to the marketing process which is modelled and analyzed. However, the company BOS will need to implement more than just the software. What this company should do is to adopt Customer Relationship Management as a concept including its practices, technologies and strategies. The implementation of this concept will be further explained in the next section.

3.3.2 Improvement of the organizational structure of the department

AS-IS: As explained before, the current structure of the marketing department is causing a damage to the whole process. The efforts of the marketing and the research specialists are completely uncoordinated, the little communication that exists between them is indirect and incomplete and research is not getting any feedback about the success of the leads that they are generating for marketing. They do not have any information about what kind of companies have the highest response rate, what kind of feedback the prospects are giving or what job titles or industries are becoming customers. With the lack of proper analysis, interperation and information about the effects of their work, the research specialists cannot improve. The management has insufficient knowledge, skills and resources to implement any kind of analytic tools and provide the neccessary input for the proper and efficient functioning of the department.

TO-BE: In Figure 13, the suggested organizational structure for the department is presented, in which there is only one manager for the whole department and 6 marketing specialists. The marketing manager should be a qualified marketing professional who would develop and implement suitable marketing strategies and coordinate the efforts of the marketing specialists. The role of the marketing specialists would be the mix of research and marketing activities, in which the employee is resposible for only 2 conferences from the beginning to the end. The marketing specialist would be responsible for: understanding and knowing the product i.e. conference, industry and market research, selecting relevant companies, extracting relevant leads from each selected company, managing the email templates for the leads, scheduling the delivery of the emails and communication with potential and actual clients. Additionaly, the department should have a Social Media Specialst who would create and manage the company's content on the social media, heavily focusing on Linkedin and extract valuable customer data from all chanels.

Figure 13. Suggested department structure



Source: Own Work.

In Table 2, an important change in the process, the suggested responsibilities of each role, are listed. Some of the responsibilities and activities perfromed remain the same, while the responsibilities of the marketing specialists are mainly a mix of the responsibilities of the marketing and research specialists in the current process, done in a different way.

3.3.3 Other organizational changes

The previously explained organizational changes, which are the alterations of the existing and the introduction of new technologies and the restructuring of and change in the roles in the marketing department, are probably the biggest, but definitely not the only ones needed in the company BOS.

One extremely significant change in the company is the organizational culture. Organizational culture is not an easily definable term, therefore it has numerous different definitions including: how companies actually do things, a shared description of the

Table 2. Suggested responsibilities of each role in the marketing process

TYPE OF ROLE	NUMBER OF EMPLOYEES	RESPONSIBILITIES
MANAGEMENT	**1**	Coordinating the department as a whole, lining-up the campaigns with the marketing specialists, develop marketing strategy, approving fires and new hires
SPECIALISTS	**6**	Conducting industry and market research, creating company lists, lead generation, scheduling and managing email campaigns, communication with prospects and customers, closing deals with customers, creating and sending credentials to conference participants
SOCIAL MEDIA	**1**	Developing a social media strategy, creating banners and videos of conference speakers, creating social media content in accordance with the strategy, creating brand awareness, extracting prospect data from Social Media platform activities
IT	**1**	Ensuring all parts of IT infrastructure works, fixing day-to-day issues

Source: Own Work.

employees about the organization, a sum of values, beliefs and rituals of the members of an organization, civilization or immune system of the organization and many different views of this phenomena (Watkins, 2013). The culture of the company BOS needs to be shifted towards a learning culture. The results from a research done on 203 Slovenian companies that employ more than 50 people, indicates that having an organizational learning culture has positive direct and indirect impact on the financial and non-financial performance of the company (Škerlavaj, Indihar Štemberger, Škrinjar & Dimovski, 2007). Following the large changes in the internal processes and tecnologies of the company, the management will need to motivate and inspire employees to participate in these changes and learn more about the new ways of functioning.

Another change that underlies the adoption of CRM is the centricity of the business process and even more, the whole company. The marketing process in the company BOS will transform into a customer-centric business process. This means that each step and each activity in the process should be done with the customer and his needs in mind. Both managers and employees need to recognize that customers are extremely valuable for the company since they are scarce, they generate the company's revenue and they create both short-term and long-term value (Peppers & Rogers, 2017). Having this in mind, everyone in the company, easpecially the marketing specialists will be able to continually improve the products for the customers and the customer experience.

3.3.4 Model of improved process (TO-BE model)

Figure 14 graphically represents the suggested marketing process, including both the use of the CRM software and the suggested new roles in the department structure. The activities with green color are actually those that are executed with the help of the CRM software. This model refers to a situation in which the CRM software is also used by the sales department and the company BOS has adopted an ERP system and has a customer database.

3.3.5 Elements in the suggested process

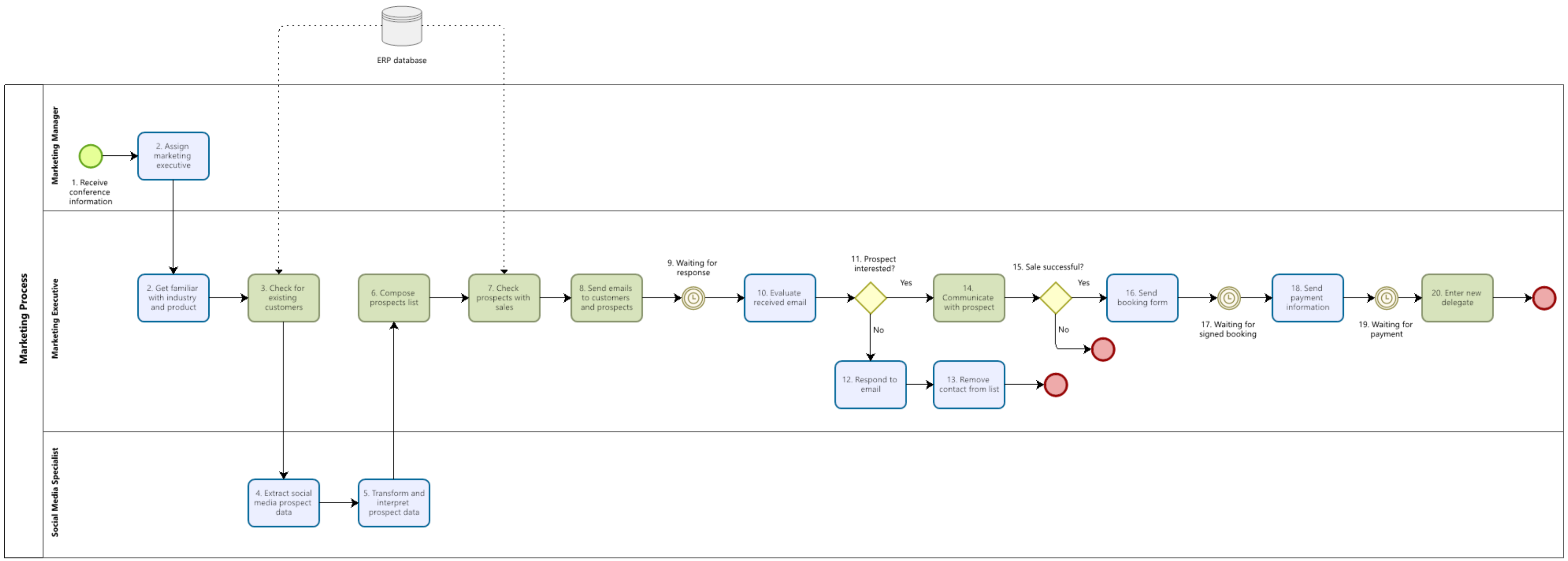
Receiving upcoming conference information (1-3)

When the marketing manager receives information about an upcoming conference, with all of the details, he assigns one of the marketing specialists to work on that product. Since most of the conferences are done annualy, it is usually assigned to the specialist that has already worked on that conference and knows it and the customers well. After that, the marketing specialist reads the conference brief and does research in order to learn more and get more familiar with the industry, the conference itself and the target markets.

Gathering data (3-7)

After getting to know the product, the specialist checks for existing customers for that product which are past delegates and sponsors for the event. It is very common for people on certain relevant positions from the same companies to attend the events every year. These are the customers that should always be contacted when working on a conference. This data, through the CRM software, is extracted from the database that is part of the ERP system of the company, which contains both customers from marketing and from the sales department. In addition, the social media specialist, based on the analytics extracted from

Figure 14. TO-BE Process Model



Source: Own Work.

several touchpoints with customers, especially Linkedin, since it is the main marketplace for B2B market, provides information to the marketing specialist about potential prospects. Based on this information, and prospects research done by the specialist himself, he creates a list of prospects to be contacted. After this list is created, he needs to check again in the database whether the prospects are currently being pitched by a sales person working on the same conference. This is made possible through the use of CRM software, which decreases the customer and prospect-related misunderstandings and miscommunications between the employees in the two departments.

Managing customer relationships (8-14)

Next, different emails about the conference are sent both to the existing customers and to the prospects. This is done with the help of the CRM software: personalized, tailor-made emails based on where the person is currently in terms of communication with the company are being sent. If a negative response arrives, asking for removal from the list, the marketing specialist replies to that email and removes the prospect/customer. When the specialist gets a positive response, the communication continues supported by the existing information about that prospect/customer in the CRM software.

Achieving sale (15-20)

If the sale of the product is successful, the customer is sent a booking form that needs to be signed and after that, payment information and instructions. When all of that is finished, the customer is recorded in the system, together with all relevant information such as: contact, product purchased, price of the purchased package, preferences and so on.

4 DISCUSSION

4.1 Requirements for Implementation of Changes

Due to the fact that adopting a CRM concept is the primary and major change suggested for the marketing department, the action plan for implementation of changes will mainly follow the steps for executing a CRM project. Although the scope of this thesis includes and explains only the marketing processes and the marketing department, the CRM concept is adopted by the company as a whole, while the CRM software would be used by the sales department also, having the same vision and goals.

4.1.1 CRM vision

The CRM vision communicates what the company intends to accomplish by making CRM efforts, preferably focusing on customer value. By focusing on maximizing the value provided to customers, the company would enable improvements that are important in the long term (Kumar & Reinartz, 2018).

The CRM vision of the company BOS is: To create tailor-made and personalized offers and experiences across all points of contact for our customers and satisfy their needs and create and sustain valuable and long-term relationships with them. This vision should be effectively communicated with management and other employees to ensure that everyone understands the CRM vision in the same way.

4.1.2 CRM goals

The CRM goals for the company BOS can be divided into three goal categories:

1. Customer loyalty
    - Improve customer retention rate
    - Increase customer loyalty by providing a personalized experience

2. Increase in revenue
    - Grow revenues from marketing
    - Enhance leads
    - Acquire new customers
    - Increase marketing campaign response rate

3. Managing data
    - Increase customer data quality
    - Have one version of the truth

4.1.3 Data requirements

Data is the central and crucial element of the CRM system, the marketing department and the company as a whole. In order to make the most out of the data, it is necessary for it to support the company's CRM activities. This means that it should be possible for the customer data to be turned into valuable information on which the company's employees can act upon (Kumar & Reinartz, 2018). In order to be valuable and of high quality, it is desirable for the data to have certain attributes. First, it needs to be accurate, meaning it should have as little errors as possible in order to be a reliable source. Second, it should be relevant or to serve a certain purpose. For the marketing department, but also for the sales department, data such as: customer name, location, job title, company, contact, past purchases or preferences, would be helpful for making future decisions related to that customer. Next, data needs to be shareable since several users may need to access it at the same time, and also transportable from the place it is stored to the end user of the data, such as both the marketing specialists and the sales agents. Data also needs to be timely, or to be available when and where it is needed, at the right time, not before or after. Finally, the data needs to be secured or protected against threats through both physical and electronic mechanisms (Buttle & Maklan, 2015). Customer data needs to be organized in a structured database, and the standard architecture for CRM applications are relationship databases, such as SQL Server, Oracle or Microsoft Access. They are composed of simple two-dimensional tables, making these databases more flexible and easier for the users extract information based on their specific needs (Kumar & Reinartz, 2018).

The database needed for the company BOS, should include both data for existing customers and for prospects. These two categories generally would be presented through the same data categories, with the difference of transaction history data that is inexistant for prospects. Both customers and prospects should be grouped and segmented based on different products i.e. conferences and different conference package to be offered through the marketing campaigns. Some of them might be good candidates for more than one product.

4.1.4 People/change management and leadership

In order for a certain change to be successful in a company, it has to be accepted and implemented not only by management, but also by the other employees affected by the change. Very frequently, due to bad change management and lack of communication with the employees, their unacceptance of the change becomes its biggest obstacle. Changing the whole “mindset” of the company’s employees and adopting a whole new concept and idea such as CRM is a huge change. In order to lead the employees to the stage of accepting and supporting the change, the company BOS can use the AIDA model. In the first step, which is attention, the management should communicate and inform others about the reasons for change, the way things will change and create a sense of urgency to make this happen. The next step is interest, which means that when people understand the change, they will become more interested, ask more questions and become aware of the benefits that they can expect. In the next step, desire, employees become more open to this idea of change and gather information about how they can get involved. In the last stage, action, employees hopefully are committed to the change and they want to have a significant role in the change (Smith King, Sidhu & Skelsey, 2015). Based on the observation and semi-structured interviews performed with the employees in the marketing department, they are already able to identify reasons for change both in the whole focus of the company and also in the process or they can even suggest possible improvements that they would like to be implemented. The leaders of the change in the company should provide information such as change initiative’s vision and goals to the employees, but also invite them to participate and ask for their opinion and feedback.

An example to learn from is the case of the company ELMS Limited, that adopted a CRM system but in a fairly limited way. One of the main causes was the company management that didn’t have any knowledge of CRM and didn’t promote active leadership. They failed to create a proper project management team, to have a knowledgeable IT personnel and to communicate the CRM strategy throughout the organization. This resulted in fear from the CRM software and resistance to use it by the employees (Bull, 2003).

Unfortunately, since CRM projects involve software, many companies make the mistake of thinking that it is responsibility of the IT department. This cannot be more false, since a CRM project involves much more than technology. The executives often fail to realize that they are the most important players in implementing a CRM system with the task of bringing together and integrating business processes, structures and people (Brown, 2016). Alongside with implementing the CRM software as the technology, leaders mustn't forget about all of the other aspects of change in the company brought by CRM adoption.

4.1.5 Technology support

From a technology aspect, an important decision that a company adopting a CRM software needs to make is the way of accessing the functionalities of CRM. Mainly, there are three options: to build or develop the software in-house, to purchase the software and install it on the company’s servers which is called on-premise CRM or to use so-called online or hosted CRM, Application Service Provider (API) model or Software as a Service (SaaS) model which means to “lease” the software and access it through the Internet while paying a monthly fee (Buttle & Maklan, 2015). All three options have their own pros and cons and are chosen based on company size, CRM project scope or functionality needs. SMEs such as the company BOS usually choose the third option: the online CRM. Implementing a cloud-based online CRM software is the best choice for BOS due to several reasons:

- The price of the hosted CRM is calculated according to the number of users or features needed which is suitable for BOS since it is implementing its first CRM project. This option offers great scalability which means that the number of users can be changed anytime up or down, lowering the risk of paying a high price for an unused software. The business is currently growing, so it might be the case that it will need to increase the number of users
- The scope of the CRM project is small-medium, so it would not be cost-effective to invest in hardware, software installation, IT personnel etc. for such a small project
- The company has no experience in CRM projects, making it smarter not to make huge investments for a CRM software
- The CRM supplier is responsible for updating the software regularly, maintenance of the software, performing trainings for the users and providing online support. This means that the company does not have any support costs or IT-personnel costs since it doesn’t have the IT skills needed in-house

- Online CRM software is more difficult to integrate with existing technologies, but this wouldn’t be a problem because the company BOS doesn’t need a lot of integration with huge systems
- The CRM functionality needs are not very specific and can be provided by a ready-made CRM solution

In order to find the supplier and offer that suits the company needs best, the management needs to consider several different options in terms of functionalities needed and price and negotiate with the software vendors. As learned from the before mentioned case of the company ELMS Limited, it would be better to have more than 2 software vendor options in order to be able to find the most fitting and competitive solution. Furthermore, it would be of great benefit if the company observes the software in another organization that has already adopted it (Bull, 2003).

In order to avoid the mistake of not taking into consideration enough software vendor options, Table 3 represents a summarization of 5 software vendors that provide the previously identified functionalities for B2B companies, needed from the software for the marketing department. These vendors are: Salesforce, HubSpot, Zoho, Nutshell and ActiveCampaign, compared in regards to 7 characteristics: price, company size suitability, whether it is more oriented towards sales or marketing, the hosting method, the platforms it can be used on, the ease of learning and ease of use and whether the support and training are included in the price or not.

As seen in Table 3, the 5 compared solutions have a few similarities and a few differences, explained below:

- Price: The price ranges in the table are per month, for up to 10000 marketing contacts and are presented only in order to get a general overview of the software prices. They all refer to the marketing package od the software. However, it must be noted that they may vary based on the number of features, number of users or additional services needed. The prices would differ if calculated on the company level, including sales department or other departments. The cost for a software may increase significantly due to costly installation, training and support that is paid additionally, type of package, integrations etc.
- Company size suitability: Zoho, Nutshell and ActiveCampaign are suitable for SMEs while Salesforce and HubSpot could also be used by large companies
- Orientation: All of the options offer both marketing and sales features, but Salesforce is more oriented towards Sales and ActiveCampaign is mostly used in Marketing, especially for email marketing automation
- Hosting method: All vendors offer both on premise and cloud hosting, with the exception of ActiveCampaign, which offers only cloud hosting option

Table 3. CRM software vendors comparison

	salesforce	HubSpot	ZOHO	ActiveCampaign	Nutshell
Price	$1250 - $4000	$3200	$140 - $520	$125 - $399	$100
Comp. size suitability	S/M/L	S/M/L	S/M	S/M	S/M
Orientation	Sales	Both	Both	Marketing	Both
Hosting method	ON-PREMISE/ CLOUD	ON-PREMISE/ CLOUD	ON-PREMISE/ CLOUD	CLOUD	ON-PREMISE/ CLOUD
Platform	Microsoft Windows, macOS, Linux	Microsoft Windows, macOS, Linux	Microsoft Windows, macOS, Linux	Microsoft Windows, macOS, Linux	Microsoft Windows, macOS, Linux
Ease of learning and use	HIGH	HIGH	HIGH	HIGH	HIGH
Support and training	Paid additionally	Included in price	Included in price	Included in price	Included in price

Source: Own Work.

- Platform: All software options can be run on Microsoft Windows, macOS or Linux
- Ease of learning and use: All of the alternatives are generally easy to learn and to use
- Support and training: All of the above presented CRM software choices include technical support and user training in the price, except for Salesforce that requires additional payment for these services.

BOS is an SME and its marketing department counts less than 10 people, so it doesn't require large, expensive CRM solutions such as Salesforce. Even if it is used by the sales department, a CRM software such as Zoho or Nutshell should be suitable in regards to the size. When implementing an organization-wide CRM software that includes the sales department, the ActiveCampaign would not be suitable due to the fact that it is more a marketing automation tool than a CRM software. The main focus in this thesis is on the marketing department as the primary user, so the orientation towards marketing-related features of the software is important. In this case, the recommended options are Zoho or Nutshell, as perceived to provide the best value for the price, and what is more important, offer exactly those features that company BOS needs for the price that is suitable for SMEs.

As mentioned before, when choosing a CRM software, it is important to have several different options to examine and choose from. Each of these options offer a free trial so that the company can see the system firsthand and should also consider other companies' real-life experiences.

4.2 Action Plan

Each CRM project implementation is consisted of several steps that may have different time length for execution. The first steps of the action plan that are related to planning, are already done in this thesis. Those are: defining the vision and the goals of the CRM implementation, defining the feature requirements of the CRM osftware, identifying the need for change management, gap analysis, process engineering and vendor research. This means that the company already has an idea of the reason for change and for implementing CRM and also what exactly it needs from this software as benefits for the company. This thesis also covered the vendor selection step, narrowing down the list of vendors to 5 that fit the company requirements for the solution. In Table 4, the following steps for CRM implementation together with a timeline for execution are presented.

In the vendor negotiation and specification phase, which is predicted to last for 2 weeks, the company composes its request for proposal that includes all the needed functionalities by the vendor. The RFP is sent to all the CRM software vendors and gets back quotes with price and other information. After a negotiation process with those with the most suitable offer, the company chooses one of them.

During the implementation phase, the software is set on the users' computers, the existing data is transferred to the software and it is integrated with other systems and applications, such as Outlook or the ERP system of the company. This phase is planned to last for 1 month.

During the following 2 weeks, the employees which will be the users of the software get a training, using resources such as videos, documents, exercises etc. provided by the CRM software vendor. It is important to make sure that all users are trained to use to software properly and get the most of its features.

Table 4. Action plan for implementing a CRM software

Step	Time	Description
Vendor negotiation and specification	2 weeks	The company writes RFP and sends to the vendors. It gets quotes with a list of features and price. The company negotiates training and support and other additional things from vendors. The company chooses the most suitable vendor.
Implementation	4 weeks	The new CRM software is set, data is transferred and the software is integrated with existing systems and applications.
Training	2 weeks	The vendor provides the training for the employees, most probably online.
Removal of old system	1 week	The company discontinues the old system in order not to be used anymore.

Source: Own Work.

After the training, the employees are using only the new software, and the old system is removed so that it will not be used by anyone.

It is worth mentioning that the company should have a monitoring system in place and perform a periodic performance evaluation, one a month or every three months of the use of the software. It could be done in the form of a survey for the employees which are direct users of the software, including what works well, what does not, what is not needed and whether the software is used to its fullest extent. This way, a proper assessment of the success of the CRM implementation can be done and the company will be able to identify the mistakes and the things that were done right during this process and use this as a base for further software implementations.

5 CONCLUSION

5.1 Contribution and Conclusion of the Research

To sum up, this master thesis is written with the purpose of discovering how a small-sized, B2B conference producing company could improve its marketing process, thus increasing efficiency, improving customer relationships and managing and using customer data in a better way. This thesis answered the research question: How can the selected company improve its marketing process? It also achieved the 5 main goals: to prepare a literature review and gain understanding of process modelling and BPM, creating an AS-IS model of the current process, analyze the process in question, create a TO-BE process model and suggest improvements, focusing on implementation of a CRM software.

In the first, theoretical part of the thesis, BPM is introduced and defined as the collection of all of the activities executed by a company in order to map, model, carry out, keep track of and improve its business processes by using several different tools, techniques and methods (Kale, 2016). The business processes, which are optimized are consisted of several elements such as: events, activities and decision points performed by actors or participants that lead to a certain outcome and value for the customer. BPM is a continual cycle composed of 6 phases: process identification, discovery, analysis, redesign, implementation and monitoring (Dumas, La Rosa, Mendling & Reijers, 2018). In the process discovery phase of the BPM lifecycle, business process modelling is done, using Business Process Model and Notation in order to understand a certain process and be able to further execute the following BPM lifecycle stages. The BPMN, as a way for graphically representing a business process, consists of 4 main categories of symbols: flow objects, artifacts, connecting objects and swimlanes. The biggest advantage and benefit of using this notation is its simplicity that enables for technical and non-technical personnel from different levels of the organization to understand, and even more, to actually create business process models using BPMN. Next, the connection between BPM and digitalization is explained, since it is the biggest driver of innovation in general and also in business processes. Due to the fact that the business process in this thesis is related to marketing, marketing, as well as digital marketing is defined with focus on CRM. CRM is a business strategy in which the focus is the customer and includes different processes, methodologies, tools and techniques in order to better manage the relationships with valuable customers (Kale, 2016). There are 4 types of CRM: operational, analytical, strategic and collaborative, each of the, focusing on a different part and level of CRM. Some of the benefits of implementing a CRM software are: reliable reports, personalized communication, proactive service, greater efficiency, better collaboration between teams and so on.

In the empirical part of the thesis, the focus is on the marketing process of a small company called BOS that produces business conferences. This business process in general is concerned with the day-to-day activities of both marketing and research employees such as: preparing for a new conference, doing industry research, lead generation, data cleansing and verification, sending email campaigns and customer communication. First, both in-depth and semi-structured interviews with key participants that play different roles in the process were done in order to gain a detailed understanding of the process from different perspectives. These participants are from the management of the department, but also lower level employees directly involved in the process. In addition, direct observation of the process was performed in order to fill in the small gaps from the interviews. The information was collected in the company's office from March to August, 2021. After sufficient information was collected, the whole process was modelled in an AS-IS process model, visually representing all of the activities and actors, together with additional explanation of the elements. The roles in the process are: marketing and research director, research manager, marketing specialists and research specialists. This enabled for identification of few issues and problematic parts of the process which are actually areas for improvement. The issues in the process include: lack of centralized, structured and up-to date database, too many redundant, manual steps, focusing on quantity over quality that leads to damaging the email servers, issues with sending email campaigns, miscommunication and lack of coordination between marketing and sales department, no communication inside the department and incompetent management of the department.

Based on this, the suggested improvements are: adoption of CRM as a concept, including implementation of a CRM software, change in the organizational structure of the department and other organizational changes, such as: culture change and shift towards a customer-centric strategy. In regards to the CRM adoption, a CRM vision and goals were identified. The vision is as it follows: "To create tailor-made and personalized offers and experiences across all points of contact for our customers and satisfy their needs and create and sustain valuable and long-term relationships with them." The CRM goals are categorized in three groups of goals related to: customer loyalty, increase in revenue and managing data. The CRM software implementation includes certain data requirements, high-quality change management as a critical part, a decision about the hosting method of the software and finally, making a careful choice about the CRM software vendor. 5 vendors are suggested and compared in terms of: price, company size suitability, sales or marketing orientation, hosting method, platforms it can be used on, the ease of learning and ease of use and whether the support and training are included in the price or not. The action plan for the actual implementation includes the following steps: vendor negotiation and specification, implementation, training and removing the old system. Furthermore, in regards to the structural changes of the department, new roles together with responsibilities are suggested, including: a marketing manager, marketing specialists and a social media specialist. All of these suggestions are summed up and mapped in a TO-BE business process model and suitable explanation of all elements.

Altogether, it could be agreed upon the fact that many companies today, especially SMEs are unaware of the benefits the digitalization can bring to the company in terms of efficiency, effectiveness, competitiveness and as the final goal, revenues. Maybe even more companies are too afraid to invest in such novelties and remain in the status quo for a long time. The company BOS is definitely in a desperate need for innovation in all of its departments, especially in the marketing department. The management of the company most certainly did not focus on this department and did not invest resources such as time, effort or finances to implement any improvements. Most of the parts of the marketing process, including the methods, techniques and tools it uses are already obsolete and completely out-of-date and need to be replaced with more modern and up-to-date, but already proven and widespread technology. In addition, the communication and coordination of the sales and marketing department are on a very low level, as they are not in the same company. It is undeniable that making revolutionary changes in any department and projects such as CRM implementation require a significant amount of time, a huge effort and can be quite costly. Also, there is a high level of risk for companies such as this one that have no or little experience and knowledge about business process reengineering, customer relationship management or executing projects of such size and type. Still, it is better to make an attempt to bring some innovation in the company and possibly fail and learn from the mistake, rather than to stay in the same place and maintaining a status-quo, not giving a chance to the company and the people to grow.

The theoretical part provides a brief establishment and literature review of the definitions, explanations and benefits needed for understanding the importance of the whole research. This part could be helpful to employees that do not have knowledge in BPM, marketing, digitalization or CRM and provide them with a solid foundation for understanding of the rest of the thesis. Further, this thesis has generated benefits for both sides, for me as a student at the beginning of my career and also for the company. I have deepened and extended my knowledge in BPM and gained experience in CRM in terms of software implementation in a real-life situation while solving a real problem. The benefit for the company is the fact that the whole process of gathering information, modelling the process and analyzing every activity, has helped the employees and the management identify and understand the issues in the whole functioning as a very important part of change management. Next, the recommendations and suggestions for improvement, with further enhancements could be implemented in the company in order for the main issues to be resolved. This thesis with its analysis and suggestions could also represent a starting point and a base for further and deeper research, as explained in the following section. Besides, this work can be used by other companies with similar problems to get an understanding or ideas for improvement of their processes. This thesis can also be used by other researchers as an example and a guide for their work in the field of BPM or CRM implementation.

5.2 Suggestions for Further Research

The recommendations for further research can be summed into three main points. The first one is, since CRM software is usually implemented on an organization-wide level, it would be useful to analyze the processes in the sales department also. This should be done in order to get the big picture of the company and properly implement the CRM software and the customer-centric approach on an organization level. This includes identifying a better way for making the sales and the marketing department to work as one company, in a more synchronized and coordinated way. Another possible direction for research would be answering the question: how the use of a CRM software in this company would affect the change of the products in order to better satisfy the customer needs? In other words, what are the direct benefits of the use of this software for the customers of the company BOS, since customers would be the new main focus of the company. Finally, it would be useful for the company to perform a cost-benefit analysis from implementing the suggested changes in this thesis, especially from the use of a CRM software as the main change in the marketing department. Also, an assessment of the whole process of change and implementation should be done, so that the company can learn and develop in the field of BPM and software implementation.

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APPENDICES

Appendix 1: Povzetek (Summary in Slovene language)

Če povzamemo, je to magistrsko delo napisano z namenom odkriti, kako bi lahko majhno podjetje, ki organizira poslovne dogodke, izboljšalo svoj trženjski proces, s čimer bi povečalo učinkovitost, izboljšalo odnose s strankami ter na boljši način upravljalo in uporabljalo podatke o strankah. Ta teza je odgovorila na raziskovalno vprašanje: Kako lahko izbrano podjetje izboljša svoj trženjski proces? Delo je doseglo tudi pet glavnih ciljev: pripraviti pregled literature in razumeti modeliranje procesov in managementa poslovnih procesov (Business Process Management - BPM), ustvariti model trenutnega procesa, analizirati trenutni proces, ustvariti model prenovljenega procesa in predlagati izboljšave, osredotočene na izvajanje koncepta managementa odnosov z odjemalci (Customer Relationships Management – CRM).

V prvem, teoretičnem delu magistrske naloge, je MPP predstavljen in opredeljen kot zbirka vseh dejavnosti, ki jih izvaja podjetje za načrtovanje, modeliranje, izvajanje, spremljanje in izboljšanje poslovnih procesov z uporabo različnih orodij, tehnik in metod (Kale, 2016). Poslovni procesi, ki so optimizirani, so sestavljeni iz več elementov, kot so: dogodki, aktivnosti in točke odločanja, ki jih izvajajo akterji ali udeleženci, kar vodi do določenega izida in vrednosti za stranko. MPP je stalen cikel, sestavljen iz šestih faz: identifikacija procesa, odkrivanje, analiza, prenova, izvajanje in spremljanje (Dumas, La Rosa, Mendling & Reijers, 2018). V fazi odkrivanja procesa življenjskega cikla MPP se modelira poslovni proces z modelom in opisom poslovnih procesov, da bi razumeli določen proces in lahko nadalje izvajali naslednje stopnje življenjskega cikla MPP. BPMN kot način grafičnega predstavljanja poslovnega procesa je sestavljen iz štirih glavnih kategorij simbolov: tokovnih predmetov, artefaktov, povezovalnih predmetov in plavalnih površin. Največja prednost in korist uporabe tega zapisa je njegova preprostost, ki tehničnemu in netehničnemu osebju z različnih ravni organizacije omogoča razumevanje in še bolj dejansko ustvarjanje modelov poslovnih procesov. Nato je pojasnjena povezava med BPM in digitalizacijo, saj je največji gonilnik inovacij na splošno in tudi v poslovnih procesih. Ker je poslovni proces v tej nalogi povezan s trženjem, je trženje, pa tudi digitalno trženje opredeljeno s poudarkom na CRM. CRM je poslovna strategija, v kateri je poudarek na stranki in vključuje različne procese, metodologije, orodja in tehnike za boljše management odnosov z dragocenimi strankami (Kale, 2016). Obstajajo 4 vrste CRM: operativni, analitični, strateški in sodelovalni, pri čemer se vsak osredotoča na drugačen del in raven CRM. Nekatere prednosti implementacije programske opreme CRM so: zanesljiva poročila, prilagojena komunikacija, proaktivna storitev, večja učinkovitost, boljše sodelovanje med skupinami itd.

V empiričnem delu magistrskega dela je poudarek na trženju majhnega podjetja BOS, ki organizira poslovne konference. Ta poslovni proces se na splošno vsebuje vsakodnevne dejavnosti tržnih in raziskovalnih sodelavcev, kot so: priprava na novo konferenco, raziskave v panogi, ustvarjanje potencialnih strank, preverjanje in urejanje podatkov, pošiljanje e-poštnih kampanj in komunikacija s strankami. Najprej so bili opravljeni poglobljeni in polstrukturirani intervjuji s ključnimi izvajalci, ki imajo v procesu različne vloge, da bi pridobili podrobno razumevanje procesa z različnih vidikov. Ti izvajalci so iz vodstva oddelka, pa tudi zaposleni na nižji ravni, ki so neposredno vključeni v proces. Poleg tega je bilo izvedeno neposredno opazovanje procesa, da bi zapolnili majhne vrzeli iz intervjujev. Podatki so bili zbrani v pisarni podjetja od marca do avgusta 2021. Po zbranih zadostnih informacijah je bil celoten proces modeliran v modelu obstoječega procesa, ki vizualno predstavlja vse dejavnosti in akterje skupaj z dodatno razlago elementov. Vloge v procesu so: direktor trženja in raziskav, vodja raziskav, vodje trženja in vodje raziskav. To je omogočilo identifikacijo nekaj vprašanj in problematičnih delov procesa, ki so dejansko področja za izboljšave. Težave v postopku vključujejo: pomanjkanje centralizirane, strukturirane in posodobljene baze podatkov, preveč odvečnih, ročnih korakov, osredotočenost na količino, ne na kakovost, kar vodi do težav pri izvajanju e-poštnih kampanj, napačna komunikacija in pomanjkanje usklajevanja med oddelkom za trženje in oddelkom za prodajo, brez komunikacije znotraj oddelka in nesposobnim vodstvom oddelka.

Na podlagi tega so predlagane izboljšave: sprejetje CRM kot koncepta, vključno z implementacijo programske opreme CRM, sprememba organizacijske strukture oddelka in druge organizacijske spremembe, kot so: sprememba kulture in prehod na strategijo, osredotočeno na kupca. V zvezi s sprejetjem CRM so bile opredeljene vizija in cilji CRM. Vizija je naslednja: "našim strankam nuditi prilagojene ponudbe in izkušnje na vseh stičnih točkah, da bi zadovoljili njihove potrebe ter z njimi ustvarili in vzdrževali dragocene in dolgoročne odnose." Cilji CRM so razvrščeni v tri skupine ciljev, povezanih z zvestobo strank, povečanjem prihodkov in upravljanjem podatkov. Uvedba programske opreme CRM vključuje nekatere zahteve po podatkih, visokokakovostno upravljanje sprememb kot kritični del, odločitev o načinu gostovanja programske opreme in končno skrbno izbiro ponudnika programske opreme CRM. Predlaganih je pet možnih ponudnikov, ki sem jih primerjala glede na ceno, primernost velikosti podjetja, prodajno ali tržno usmerjenost, način gostovanja, platforme, na katerih se deluje rešitev, enostavnost učenja in enostavnost uporabe ter ali sta podpora in usposabljanje vključeni v ceno ali ne. Akcijski načrt za dejansko izvajanje vključuje naslednje korake: pogajanja in izbira ponudnika, uvajanje rešitve, usposabljanje in odstranitev starega sistema. Poleg tega sem glede strukturnih sprememb oddelka predlagala nove vloge skupaj z odgovornostmi, med drugim: direktor trženja, vodje trženja in specialist za družbene medije. Vsi ti predlogi so povzeti in preslikani v model prenovljenega poslovnega procesa ter ustrezno razlago vseh elementov.

Ugotavljam, da se danes mnoga podjetja, zlasti majhna in srednja, ne zavedajo koristi, ki jih lahko digitalizacija prinese podjetju v smislu izboljšanje učinkovitosti, uspešnosti, konkurenčnosti in kot končni cilj prihodkov. Morda se še več podjetij preveč boji vlagati v takšne novosti in dolgo časa ostati v statusu quo. Podjetje BOS vsekakor obupno potrebuje inovacije v vseh svojih oddelkih, zlasti v oddelku za trženje. Vodstvo podjetja se zagotovo ni osredotočilo na ta oddelek in ni vlagalo sredstev, kot so čas, trud ali finance za izvajanje kakršnih koli izboljšav. Večina delov tržnega procesa, vključno z metodami, tehnikami in orodji, ki jih uporablja, je že zastarelih in popolnoma zastarelih, zato jih je treba zamenjati s sodobnejšo in najnovejšo, a že preverjeno in razširjeno tehnologijo. Poleg tega sta komunikacija in usklajevanje oddelkov prodaje in trženja na zelo nizki ravni, saj nista v istem podjetju. Nedvomno je, da revolucionarne spremembe v katerem koli oddelku in projekti, kot je implementacija CRM, zahtevajo veliko časa, veliko truda in so lahko precej dragi. Prav tako obstaja velika stopnja tveganja za podjetja, ki nimajo ali imajo malo izkušenj in znanja o preoblikovanju poslovnih procesov, upravljanju odnosov s strankami ali izvajanju projektov takšne velikosti in vrste. Kljub temu je bolje, da poskušamo vnesti nekaj inovacij v podjetje in se morda zmotiti ter se učiti iz napak, namesto da ostanemo na istem mestu in ohranimo status quo ter ne dajemo priložnosti podjetju in ljudem rasti.

Appendix 2: Interviews with Research Manager and Marketing and Research Director

Question 1: Can you tell me some general information about the company BOS with regards to its size, location, what it does, what departments there are?

Marketing and Research Director: The company BOS is founded in 2012 and today is present on 3 different locations. The departments are the following: sales department, production department and marketing and research department. The total number of employees are around 100. The marketing and research department, in the past year has been making around ¼ of the company income. This is why the top management of the company is now planning to focus more on this department and this way of selling the conferences.

Research Manager: The main acitivity of the company BOS is producing B2B events, and the sales and the marketing and research department are responsible for selling those confreneces. The sales department is the biggest one, counting around 80 employees, the marketing and research department has less than 10 and the production department around 10 employees. Up until early 2020, the events were held on physical locations in different cities in Europe. When the COVID-19 pandemic started, the company hired a software company to create a digital platform for the conferences and it has been using it since then.

Question 2: What are the roles in the marketing and research department? What are the responsibilities of each employee?

Marketing and Research Director: I am responsible for coordinating the whole department and together with the research manager, we are making sure the efforts of the marketing and the research part of the department are coordinated. I am approving new hires and fires, while the research manager takes care of interviewing and training new employees. I am directly responsible for the marketing specialists and for the research manager, while the research manager is directly responsible for the research specialists. The marketing specialist are responsible for scheduling and sending the email campaigns, keeping track of the responses, creating videos and banners and posting them on LinkedIn.

Research Manager: My main responsibility is delegating the conferences to the research specialists and preparing the data available for those conferences. I am also in charge for preparing the bonuses for the researchers and all needed trainings related to research.

Question 3: Is there a company database that contains all of the data that is collected that is used by both marketing and sales department?

Marketing and Research Director: There is no unified database that contains all company data on prospects and customers that can be used by both departments.

Research Manager: No, there isn’t. The data collected by both departments is kept separately, in different places and formats. Data from the marketing and research department is kept on numerous Excel files.

Question 4: What do you perceive to be the biggest issues the marketing and research department is facing?

Marketing and Research Director: There are too many things that are done manually and that really makes the whole process last longer and decreases efficiency. If some parts of the process were automated, less employees would be needed, more prospects can be identified and the whole process would be faster and more successful.

Research Manager: In my opinion, the fact that there is no database where everything will be stored is really the biggest issue. Before the start of each conference, I have to manually go through a lot of Excel files, prepare that data, validate the email addresses and merge everything in order to be able to use this data from past years.

Question 5: In your opinion, what are the biggest areas for improvement in this department?

Marketing and Research Director: As I mentioned, the automation of the activities of the process that could be automated, would be of great benefit for the whole department and the whole company. Also, it would be great if the company would gain more visibility on social media, especially LinkedIn.

Research Manager: The lack of a database and the email address verification process.

Question 6: What do you think of the quality of the data that the marketing and research department is collecting and using?

Marketing and Research Director: According to the fact that we are sending a lot of emails to invalid email addresses in our campaigns, I would say that our email address finding process is not really good because it is producing this kind of data.

Research Manager: I think part of the data is quite useful, but there is a good portion of it that is stale and incorrect.

Question 7: In your opinion, what can the company do to make better use of the company data?

Marketing and Research Director: I think it is a really good idea to first find a way to increase the quality of the data and then use this process to offer finding prospects as a service to other companies, in other words to sell the data.

Research Manager: The data would be of much better use if it was updated and cleaned regularly, stored in one centralized location and of good quality.