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**The role of automation in the efficiency of B2B
email marketing**

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ABSTRACT:

The aim of this thesis is to explore how automation tools influence enhancing the efficiency of email marketing in B2B marketing. This thesis combines both Resource-Based View (RBV) and Technology Acceptance Model (TAM) as a theoretical framework. In the thesis, the theoretical framework connects email marketing automation with ease of use and competitive advantage within the organization by analysing its benefits and challenges.

A qualitative research method has been chosen for the methodology in this thesis. The data has been collected through semi-structured interviews which were conducted with employees, managers, and developers from five companies with diverse backgrounds to ensure the reliability and accuracy of the findings. These case firms include companies such as wholesale, medical sector, travel agency, software, and education. In data analysis, thematic analysis was used in order to identify patterns and add themes to the analysis.

The study reveals that automation plays an essential role in enhancing the efficiency of email marketing. The findings suggest automation provides numerous benefits to email marketers beyond merely improving efficiency, and contributes to the transformation of users' roles towards strategic work. Additionally, automation helps companies in achieving competitive advantage. These findings of this study align with the literature, theoretical framework and provides various theoretical and managerial implications. It provides valuable perspectives to managers on how to gain competitive advantage through the use of email marketing automation, which can enhance revenue growth in the organization. In conclusion, the study highlights that automation is a powerful tool in the current business environment, as well as support strategic roles for employees.

KEYWORDS: Email Marketing, B2B, Automation, Efficiency, Marketing Automation Tools, Business Performance

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Abbreviations

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| B2B: Business to Business |
| RBV: Resource-Based View |
| TAM: Technology Acceptance Model |
| AI: Artificial Intelligence |
| CRM: Customer Relationship Management |
| B2C: Business to Customer |
| ESP: Email Service Providers |
| CTR: Click-through Rate |
| CTOR: Click-through Open Rate |
| ERP: Enterprise Resource Planning |
| S & MA: Sales and Marketing Automation |
| SMEs: Small and Medium Enterprises |
| BI: Business Intelligence |

1 Introduction

Email marketing is the most believed medium of marketing in the current scenario than traditional digital marketing, as shown by the market research (Bawm & Nath, 2014). It is used by many companies in the world, such as B2B and B2C companies (Zhang et al., 2017). Email marketing has become one of the most budget-friendly among various digital tools, which provides more ROI and faster access to the aimed users (Rijn, 2026). To the group of people who are using electronic mail are directly being marketed as a business message to send advertisements, sales or donations, and make requests to the business to the possible customers of the business (Bawm & Nath, 2014). In addition to this, the business message or the communication is made especially for making engagement of the customers to make a purchase (Georgescu & Teiu, 2020). Moreover, an essential part of current communication is believed to be email and the total users of email is 4.48 billion in 2024 (Novelo et al., 2025).

Companies are becoming dependent upon email marketing more than before, and they have sent promotional email campaigns approximately 23 billion in 2023, which resulted order increased by 17% (Omnisend, 2024). The revenue-based ROI was enhanced to £ 38 for each pound 1 used in email marketing, as compared to the average ROI of £ 24.93 in 2013, as per the study by the Direct Marketing Association (UK) Ltd in 2015 (Zhang et al., 2017). In comparison, for B2B email marketing, the ROI has become dollar 46 for every 1 dollar spent (Lee, 2025). Therefore, email marketing has significant importance for the business as well as for maintaining good customer relationships.

Additionally, email marketing software has significantly improved the work by building and optimising bulk emails to subscribers (Bawm & Nath, 2014). Meanwhile, the study shows that it also makes vital data available to the marketers. This kind of software is also known as automation. By using the software, marketers are able to track and optimize their marketing campaigns easily, which are based on subscribers' activity histories (Bawm & Nath, 2014). Companies are using these automation tools for their possible future customers as well as to know the information of current customers (Georgescu &

Teiu, 2020). Additionally, marketing automation is important to automate the marketing processes more efficiently (Todor, 2016). Furthermore, the study shows that it helps in automating tasks such as customer segmentation, campaign management and data integration, which helps in saving time and minimising the manual effort. The study shows that it helps to improve efficiency, increases revenue and helps to make smarter marketing strategies. The report of Onmisend (2024) shows that compared to email campaigns, automated emails have more open rates, which increased to 42.1% from 25.2%, click rate to 5.4%, and 1.9 % of conversion rate. This shows that automated emails are more effective than simple email campaigns. Marketing managers get help from the insights of email effectiveness to understand how to reach their customers effectively (Thomas et al., 2022).

The study of Guercini, S. (2023) focuses on the broad concept of marketing automation without focusing on a specific context. The study also highlights the need for future research in more specific contexts of marketing automation within a specific company. Although marketing automation is widely researched, there is still a lack of research on email marketing automation. The automation was discussed in general terms without focusing on a specific context or industry (Guercini, 2023). Therefore, this thesis seeks to address this research gap by focusing on the efficiency of email marketing automation in B2B contexts. The purpose of this study is to explore the research gap by answering the following research question.

Research Question: What is the role of automation in the efficiency of B2B email marketing?

The study will be conducted by using a qualitative method with primary data collection from the interviews. The semi-structured interviews will be conducted among participants who have experience in using email marketing automation in B2B contexts. Additionally, the study will emphasize the employee's perspective to provide practical insights into the real use of email automation tools in the real business environment. Furthermore, the findings are expected to contribute to filling the gap in the research on

B2B marketing automation in terms of its efficiency. The research is relevant in the current scenario as there is limited research on the efficiency of automation in email marketing, especially in B2B market, and also these companies are heavily under pressure to gain measurable outcomes in email marketing with fewer resources.

The study intends to provide several contributions. Firstly, this study contributes to the B2B market in the academic literature, managerial implications and the research on email marketing automation by shifting the focus from the B2C contexts. By finding out how automation improves efficiency, this study fills the clear research gap. In addition to this, the study provides a foundation for future studies in a similar area. Secondly, the findings of the study will be helpful to the marketing employees and managers in the B2B market. The study can help the companies by providing the insights from the findings to make more effective strategies, optimise resources, and gain better communication and build relationships with their customers.

The thesis consists of five main chapters. The first part of the thesis consists of an introduction part which presents the background of the study, problem statement, research gap and research questions, significance of the study and an overview of the research methodology. The second part consists of a literature review, which reviews the existing literature related to email marketing, marketing automation and the impact of marketing automation on the efficiency of email campaigns. This part identifies the research gap in previous research and establishes the theoretical framework for this study. Similarly, chapter three contains research methodology, which describes the research design, data collection methods, and data analysis methods. In addition to this, it states the reason to choose the qualitative method over the quantitative method to answer the research question.

Chapter four contains results and analysis, which provide the findings from the data collection, i.e semi-structured interviews. The findings will be structured according to the research question. Similarly, the chapter demonstrates strong themes created through

interviews which emphasizes on how automation is helping automation users to increase efficiency in email marketing. Finally, chapter 5 presents the discussion, conclusion and recommendations. This part discusses the results from the data analysis, draws the conclusions and highlights the practical and academic contributions as well as possible recommendations for future research.

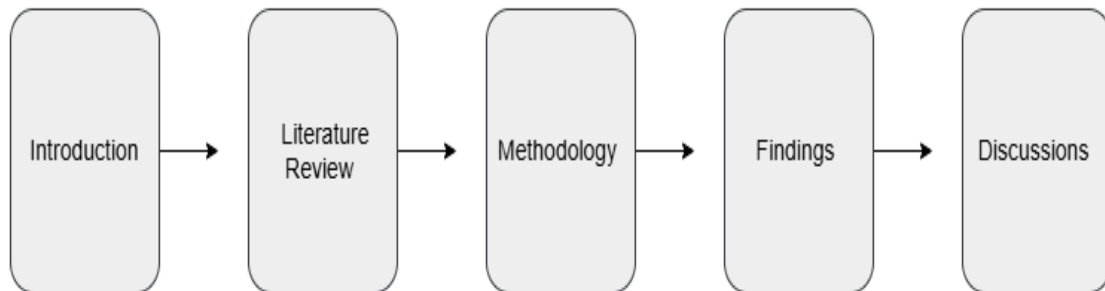


Figure 1: Thesis Structure

2 Literature Review

The literature review in this research begins with the key terminology along with the automation, email marketing and email advertising. Additionally, these are followed by use of automation in email marketing, comparison of traditional and automated marketing, and challenges. Further, future of automated marketing is discussed and finally demonstrating theoretical framework which is the foundation for analyzing how automated email marketing affects efficiency in the organization.

The given table presents the key terminologies that are used in the thesis. The main terms include automation, email marketing, marketing automation and marketing automation software.

Table 1: Key Terminologies.

| Terms | Author | Definitions |
|--------------------------------------|-------------------------|--|
| Email Marketing Automation | (Makhijani, 2024) | The system that sends marketing campaigns and targeted emails automatically without using manual method, which are based on the certain rules and triggers are known as email marketing automation. |
| Email Marketing | (Jaiswal & Ranka, 2024) | The modern marketing strategies which help in making effective engagement of cusmers and its ability to convert them into buyers through email is known as email marketing. |
| Marketing Automation | (Mero et al., 2020) | The efficiency of marketing activities can be enhanced by using tool known as marketing automation, with the help of automated tasks and using the features of tool. |
| Marketing Automation Software | (Silva et al., 2021) | Marketing automation software is used in business to automate marketing activities, which makes tasks more efficient and personalized is used in business to automate marketing activities, which makes tasks more efficient and personalized. |

2.1 Automation

The main goal of marketing automation is primarily focused on saving companies' time in various activities related to processing and running daily work (Iankovets, 2024). The automatic creation, adaptation and management of email campaigns with the help of artificial intelligence is regarded as email automation (Novelo et al., 2025). Additionally, customers' automation processes are handled by the operational CRM, which utilises various applications, including mobile, front-office, and back-office systems (Al-Homery et al., 2019). Marketing automation is a tool in the software form which is used on the internet to convert marketing campaigns into real use (Georgescu & Teiu, 2020). As per the author, marketing automation is adapted by the email marketing between 2005 and 2010. In addition to this, in the digital scenario, marketing automation is helping to analyze consumer behavior by finding and analyzing their buying patterns (Boozary et al., 2024).

Additionally, marketing automation allows for market reach among the possible customers through an email campaign (Georgescu & Teiu, 2020). Furthermore, this study has focused on the use of email marketing in the two years before 2020, calculation of emails if it is related to database size, changes in open rates and click rates with the change of emails and the study of email trends if it differs from the average over those two years. This paper has followed a quantitative research method to figure out the given research areas. The findings were based on the quantitative numbers, but the findings could not provide a detailed role of email marketing automation in efficiency. Additionally, the author does not provide information about B2B marketing as it is focused on the European market as a whole. Therefore, this thesis aims to study about the limited research area in the role of the tool B2B marketing.

The automated processes are becoming more efficient due to the use of business intelligence (Todor, 2016). The study shows that marketing automation and customer relationship management help to keep and lure customers into the business, and Business intelligence (BI) tools help to analyse the existing sales. Moreover, this tool is also considered for being a strategic asset in the company, especially in the CRM aspect

(Georgescu & Teiu, 2020). Boozary et al. (2024) Support this, as this tool effectively converts marketing strategies into sales impact among customers. Furthermore, this led to creating reports and making marketing campaigns more effective (Todor, 2016, p. 88). These studies highlight the important role of these tools, but further research is still needed to understand how these tools improve the efficiency of email marketing in B2B the market.

In the current scenario, AI has become powerful in service automation, where AI-powered virtual agents are performing this automation (Chowhan, 2025). Service automation is a tool which performs its function in five main areas, and they are call related centres, contact centres, service in the field, help desks and web self-service (Al-Homery et al., 2019). These agents help in managing daily operational tasks as well as enhance the business (Chowhan, 2025). The study notes that these agents handle even complicated tasks such as making customer accounts, managing returns, processing orders, and making it easier and more accurate in the finance department. As per the author (Chowhan, 2025), the companies that have used AI in the customer service sector have experienced better results in solving customer problems easily and even on the first attempt.

Therefore, by using the application of the CRM systems, all the functions of customer service, sales, and marketing are automated and combined internally (Al-Homery et al., 2019). After a long period of time, operational CRM helps in reducing costs, improving revenue, providing smart solutions to the arising problems and providing many perspectives of the customers with mutual interaction, which has helped the organisations to gain many benefits from it (Al-Homery et al., 2019). That's why (Bose, 2002) stated that business processes and technologies are integrated by the CRM to provide satisfaction to the customers.

2.2 Email Marketing

Many marketing researchers, authors and companies in the past fifteen years have been expressing their concerns about email marketing (Bawm & Nath, 2014). The study shows that, along with email marketing, marketing strategies and technology have enhanced the way of delivering the best value to the customers. The first commercial email was mailed to 400 users via ARPANET by Gary Thuerk in 1978 (Bawm & Nath, 2014). Emails help in sending messages to customers at a low cost; due to this, it has gained popularity widely (Zhang et al., 2017). Merisavo and Raulas (2004) support this idea as email marketing helps to enhance brand loyalty among customers. The study shows that if customers like the content or the messages, they recommend them to their friends. In email marketing, in order to maximize performance and communication, content needs to be personalized (Surjandari et al., 2024).

Additionally, to ensure the company's success, they need to make marketing activities strong to make customers buy their product (Mele et al., 2015). It is essential to make appropriate marketing resources for companies based on B2B (Jagodič & Milfelner, 2022). Additionally, for making better email marketing, segmentation can be used for potential customers, involving personalized and useful emails (Surjandari et al., 2024). The study shows that if the company used these kinds of features in the email marketing, the company could get better performance in email marketing and help in cost efficiency.

Similarly, the behavioral acceptance is important because the resource-based view (RBV) framework focuses on the company's resources, and the way they are used affects the performance (Uyanik, 2023). Additionally, the author notes that the resource-based view focuses on gaining competitive advantages by using the company's internal resources and capabilities. RBV helps in understanding the reason of some companies have a competitive advantage continuously and achieve huge profits compared to their competitors (Sugiarno & Novita, 2022). Therefore, when employees want to use or feel easy to use email automation tools, this helps to make strong organizational capabilities, which finally gains a competitive advantage in the company. Each company's marketing

activities start with strategic planning (Nobre & Silva, 2014). Long-term competitive advantage and comparative advantage are created by the company's marketing strategies (Jagodič & Milfelner, 2022).

Among the various digital marketing tools, email is the most popular tool, which helps in making the user shift from one stage to another in the customer journey by giving more return on investment (Dice & Henneberry, 2020). Iankovets (2024) supports this idea as this tool builds good relationships and makes better communication between the subscribers and customers of the company through email. In the email marketing platforms, there are various abilities that they should have. Among them, the most essential is that it should send the email as well as it should deliver the email to the respective inboxes, change the subject line, pre-schedule the email to send, and be able to change the sender information (Todor, 2016, p.92). Additionally, the study shows that it should have features such as adding an unsubscribe link and eliminating email addresses from the list when the email does not deliver to the respective inboxes. Therefore, email is known as a powerful digital marketing tool because of its ability to personalize communication, build strong customer relationships, and provide high returns.

Considering the emails sent by the companies, they are divided into three aspects (Dice, Henneberry, 2020): they are promotional emails, relationship-building emails and transactional emails. Email newsletters are widely used marketing emails for promoting various kinds of offers to people on an email list (Iankovets, 2024). Relationship-building emails help in providing customer value to make better relationships between the customer and company by providing various offers such as free content and information (Iankovets, 2024). As per the author, transactional emails are used for providing a response to the customer in their activities during the process of communication with the company. This type of email has the highest number of open rates and produces 2-3% revenue, then the uniform emails, which are sent to a large audience (Dice & Henneberry, 2020).

In B2B markets, marketing employees make transactions on the basis of the long-term relationships which they have built with the customer, as the purchasing decisions are

difficult (Jagodič & Milfelner, 2022). Additionally, B2B marketing strategies affect the performance of a company positively by aligning the needs of the customers, developing a strategy and using valuable resources (Jagodič & Milfelner, 2022). The study shows that well-designed B2B marketing strategies make better performance of the company.

Jagodič & Milfelner have conducted a literature review using four academic articles and a quantitative study using a questionnaire among 60 respondents. The study lacks qualitative insights about B2B marketing strategy, marketing support, market orientation and service quality. The study concluded that it is depended mostly upon numbers, and it was found that the market orientation has the main role in enhancing effective B2B marketing strategies, improving company performance.

2.3 Email Advertising

Email advertising is a part of email marketing. Among all internet marketing, email advertising is one of the most influential and cost-effective (Jamalzadeh et al., 2012). Email advertising is one of the online advertising platforms which is a huge money-maker service (Jamalzadeh et al., 2012). The reason behind this is that the ads emphasize specific people and receive fast responses, and it costs less to approach (Gopal et al., 2006). An integration of HTML with the email campaigns, which is targeted to potential customers' inboxes sending, promotional messages, is regarded as the design of email advertising (Zhou et al., 2025). Additionally, email advertising is also considered a powerful form of technology which has the capacity to boost the success of marketing and enhance the brand image (Tezinde et al., 2002). The early studies by authors highlighted in broader terms the effectiveness of advertising, while later studies show that email marketing is a superior digital form.

Consumers have various perceptions of email advertising. Consumer response to the marketing campaign shows their real characters rather than the intention (Kent and Brandal, 2003). For example, a consumer who has a favourable intention shows a

positive response to the sender (Martin et al., 2003). An email advertising is especially focused on maintaining customer relationships and helps in loyalty and purchases that could be made by customers (Zhou et al., 2025). The study shows that this advertising mainly sends promotional offers and updates about the company.

Bertrand et al. (2010) did a real-world experiment with a lending company to test various versions of the advertising email as a way of offering a loan. The authors researched that the email context had a minimal but significant effect on the results. Similarly, Sudhir et al. (2016) did a field experiment for charity donations using direct mail campaigns with a story of an ingroup person; they found better outcomes. In the case of online banner ads, Lambercht and Tucker (2013) and Bleier and Eisenbeiss (2015) show that personalised online ads improve engagement and effectiveness by displaying previously viewed products in advertising.

In the case of direct response media, before sending the ad to the person, personal information of the specific person is included to make the ad more personal and relevant (Sahni et al., 2018). The study shows that advertising is affected by privacy concerns and personalization. Similarly, in email advertising, people usually don't prefer spam email ads, and this leads to negative attitudes due to the interruptive nature (Chang et al., 2013). For example, when a person's name is mentioned in the ads, they perceive it as a violation and perceive a negative reaction towards the advertiser, which can minimise the sales of the advertised product (Sahni et al., 2018). Meanwhile, the study shows that permission-based email ads are more acceptable and have a positive influence. Together, these findings suggest that personalization can improve the relevance, but its effectiveness is dependent upon consumer trust and privacy concerns.

2.4 Use of Automation in Email Marketing

In marketing, automation has played a vital role by reducing the time and providing various resources needed for performing tasks to increase efficiency (Kedi et al., 2024). A marketing automation platform consists of four main elements, and they are lead management, campaign management, email marketing, progressive profiling and dynamic content (Todor, 2016). The study shows that lead management includes lead generation, capturing customer inquiries, sorting and distributing leads and lead nurturing. An email marketing platform helps in sending emails to various customers and individuals (Todor, 2016). The study shows that progressive profiling and dynamic content is a type of using dynamic website forms to capture more information about a visitor, and this helps businesses in lead generation in various fields.

Marketers use CRM automation to track and monitor the progress by creating new ways of appealing to customers in advertising or marketing campaigns (Todor, 2016). The study shows that the tracked and monitored data are used by the marketers to make an effective campaign. Additionally, the study shows the software used tracks when customers use and look at the product for the first time and later when they buy it. This helps to analyze the marketers to find out the best marketing efforts (Todor, 2016). The author conducted a literature review and some cases to analyze the information related to automation and the findings. This study lacks qualitative and quantitative insights, and the generalization is limited. Additionally, the author has concluded that marketing automation helps in improving marketing efficiency, enhancing lead generation and a multi-channel view of prospect behavior.

Due to the difficult situation in the competitive market among the companies, sales and marketing automation are being used more (Corsaro et al., 2021). The marketing and sales automation has helped the companies to make higher marketing efficiency, more productivity results, effective marketing activities (Buttle and Stan, 2015). Similarly, the study shows that due to data and analysis, it has made a high responsibility of marketing expenses, advanced reporting, effective customer experience and high customer engagement (Buttle and Stan, 2015). Additionally, Jarvinen & Taiminen (2016) support this

idea by adding that marketing automation helps in improving and creating more sales with the help of personalization and segmentation. Moreover, Mahlamäki et al. (2020), argue that the elements of the effectiveness gained by the companies are represented by the quality of the information and flexibility of the system.

The study of (Corsaro et al., 2021) has focused on the B2B relationships, which are connected to the research question of this thesis. This study helps in my research areas as, (Corsaro et al., 2021) have emphasized mostly on the automation areas. This article aims to find out the answer related to the way of value generated by S & MA after Covid-19, and to find out the value drivers from the way of buyers. Both qualitative and quantitative research methods are involved in this study. Additionally, the study concludes that sales and marketing automation's role was very important during the Covid period because companies at that time focused more on relationships and integration in order to manage uncertainty (Corsaro et al., 2021). However, the study's findings are limited as the data were collected only from Italian B2B firms, and it is dependent upon self-reported and cross-sectional data.

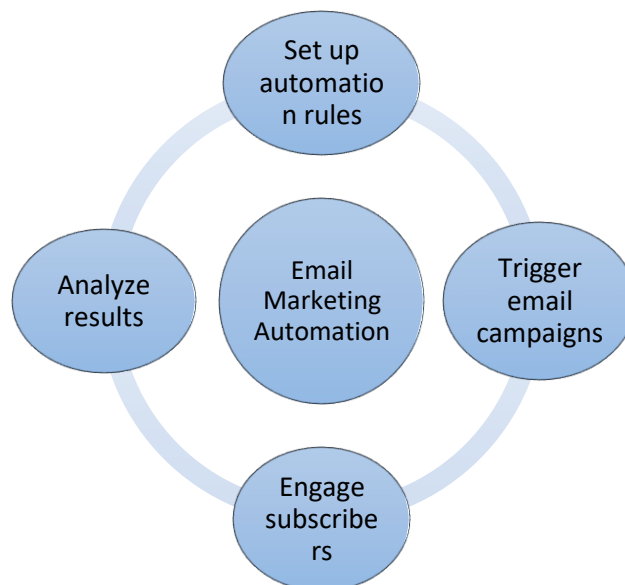


Figure 2: Email marketing automation cycle (adapted from Makhijani, 2024).

The above figure shows the email marketing automation cycle that begins with making the automation rules with the help of automated tool. After that, on any event or occasion, emails will be triggered to the targeted customers. For example, welcome emails, reminder emails and thank you email. Similarly, after the trigger emails, the tool monitors the customers who have subscribed to the website or any site. Finally, the results will be analyzed by the tool.

The automation system sends email automatically to the customers or people based on the automation rules (Makhijani, 2024). The author notes that marketers make templates to send the mail instead of using handwritten notes in specific situations or events. For example, customers get emails when they sign up for any website, subscribe to the website and so on (Makhijani, 2024). Additionally, email marketing tools help in making automated workflows and at the low costs, this sends personalized emails to the targeted customers (Defau et al., 2023). Meyer (2025) supports this idea as this automation is mostly used to make personalized email campaigns, and customers are kept segmented according to their behavior and demographics. The author believes that this helps to increase the engagement and conversion rates. Trigger emails, such as welcome messages and cart abandonment, help to increase sales and grow business (Mailchimp, 2026).

TAM (Technology Acceptance Model) is used in this thesis because it is generally used to understand or analyze how user perceptions affect their behavior in accepting the technology (Harryanto et al., 2018). TAM focuses on how users' attitudes towards using new technologies or tools are influenced by their perceptions of usefulness and ease of use, due to the cognitive process which is engaged in the acceptance of innovation (Masrom, 2007).

Therefore, when employees feel ease of use while using tools, they are likely to use the tools and have a positive attitude towards the technology. Additionally, after the adoption of the tool, the automation tool helps to enhance the efficiency of the work and provides various benefits that could lead to strong competitive advantages. In B2B email marketing, the features of automation, such as personalization, performance tracking,

are regarded as perceived usefulness since they help in minimizing manual effort and improving efficiency.

2.5 Traditional Marketing vs Automated Marketing

Traditional marketing uses offline and advertising channels by handling the needs of the targeted customers and generating revenue (Kowshik, 2023). This marketing includes direct mail, print advertising, broadcast advertising and telephone (Sinha, 2018). Traditional marketing is effective in order to find new customers as the targeted audience is reached easily through advertisements on billboards, television and radio (Kowshik, 2023). Additionally, the study shows that these advertising methods have helped to build and maintain credibility as customers find it more reliable.

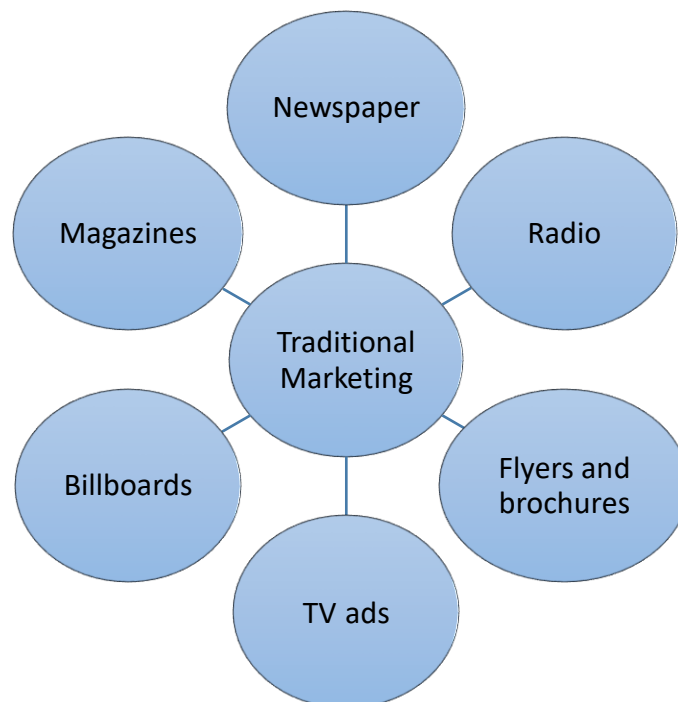


Figure 3: Traditional Marketing (Sinha, 2018).

The above figure shows the six main objectives of traditional marketing. They are newspapers, magazines, billboards, TV ads, radio, and flyers and brochures (Sinha, 2018). The Traditional method is expensive every time a company starts to make a new campaign because it must pay the media (Kowshik, 2023). However, (Sinha, 2018) argues that traditional marketing is inexpensive if the ratio of cost is examined to reach their customers. Additionally, traditional marketing has a lower capacity to convey much information or messages (Kowshik, 2023). The study further shows that it does not provide flexibility for changes in the advertisements, which makes it difficult to understand and change the advertisement according to the customer's preferences.

Traditional email marketing often involves sending emails directly to targeted customers with relevant information (Kesarwani, 2019). The study shows that email marketing generally includes email newsletters, transactional emails, direct emails and welcome emails. It emphasizes direct sales, product awareness, brand recognition, and relationship building (Kesarwani, 2019). However, traditional email marketing does not include automation and software. Emails are sent manually, and the same content is used for everyone. It can be said that it is mostly one-sided communication, where the company send emails to the customers, but it's unknown whether the customers respond or not.

Therefore, the features of traditional email marketing lack in measuring results and tracking customers (Sinha, 2018). Traditional email marketing is time-consuming, as emails are created and sent manually. The features of automation, such as personalization and customisation, lack in traditional email marketing. In contrast, automated email marketing helps to make personalized content and make the audience engaged, attract and connect customers and marketing programs in real-time (Sinha, 2018).

As per the annual report of Trainer's House 2017, the company is involved in consulting, training programs, and changing management tools to help customers and achieve their strategic goals. The company focuses on marketing activities such as customer-oriented B2B content, lead generation, and powerful presence on digital media such as LinkedIn, Facebook, and email, with the help of marketing automation. Additionally, with the help of marketing automation, the company is involved in personalized communication and

practical training. This has helped the Trainer's House to make a strong relationship with customers and foster business growth. Therefore, this case shows that marketing automation helps in improving efficiency, customer relationship management, and ultimately business growth.

2.6 Effectiveness in email marketing

When email advertising achieves its aim, then it is called effectiveness in email advertising (Chang et al., 2013). Different kinds of campaigns are run by the marketers, such as engagement campaigns, lift campaigns, segmentation campaigns, and re-engagement campaigns (Iankovets, 2024). Especially these kinds of campaigns are analysed to measure their effectiveness (Iankovets, 2024).

The B2B market can benefit from the use of automation, such as improved time efficiency, better personalization and improved performance. This tool helps in enhancing efficiency by using the characteristics of the tool, such as segmentation and campaign management (Backlinko, 2026). However, (Novelo et al., 2025) argue that personalization in email marketing can create some challenges as AI systems could still make simple personalized emails and could not fully understand individual preferences of the customers.

Similarly, segmentation works in dividing the market into smaller groups according to the shared characteristics and preferences for making efficient targeting and strategy (Morandini & Dobrinić, 2018). Additionally, segmentation in email marketing helps to enhance product marketing, its performance and cost efficiency (Surjandari et al., 2024). Moreover, automation allows users to use A/B tests, which can help to make better email marketing campaigns and understand their customers (Defau et al., 2023). Email marketing effectiveness is measured by indicators such as the number of subscriptions and clickability indicators (Bawm & Nath, 2014).

Table 2: Number of Subscriptions (Iankovets, 2024).

| | |
|---|--|
| The delivery rate of letters (Delivery Rate): | The delivery rate can be defined as the value of percentage of all letters from the mailing items that successfully reached the recipients' email accounts, whether these emails appear in the inbox or the spam folder (Iankovets, 2024). |
| Indicator of open letters Open Rate (EOR): | EOR is defined as the ratio of percentage of the number of letters that are opened and the number of letters that are sent (Iankovets, 2024). |
| Unsubscribe and complaints (Unsubscribe Rate/ Complaint Rate): | Unsubscribed rate refers to the group of people who remove their subscription from the newsletter compared to the number of delivered letters (Iankovets, 2024). Meanwhile, the complaint rate refers to the group of people who sent the contents to the spam folder (Iankovets, 2024). |

The above table number 2 provides brief information about number of subscriptions that are used in email marketing and their definitions. These includes delivery rate, indicator of open letters and open rate, and unsubscribe rate or complaint rate. Similarly, in table number 3, it provides information about clickability indicators that includes click-through rate and click-through open rate.

Table 3: Clickability indicators: Click-through Rate (CTR) and Click-through Open Rate (CTOR) (Iankovets, 2024).

| | |
|------------------------|---|
| CTR | CTR is defined as the percentage of users who click on the link, image or button in the email in comparison to the total emails which were delivered (Iankovets, 2024). |
| CTOR | It is the percentage of clicks compared to the number of open emails (Iankovets, 2024). The study shows that the CTOR helps to make it clear how interested subscribers are in the newsletters because this count clicks only from those people who really opened the emails. |
| Conversion rate | This rate describes the percentage of users who responded to the emails, such as purchasing, visiting specific pages on the website, and so on (Iankovets, 2024). In addition to this email, conversion depends upon the factors such as value proposition, design and quality of website content, etc (Iankovets, 2024). |

| | |
|-------------------------|--|
| Email reputation | This is a difficult indicator which is calculated based on the trust towards the company by email distribution services (Iankovets, 2024). The study shows that the email reputation is dependent upon the inbox letters or spam letters. Additionally, the email reputation is impacted by many things, such as if the website's IP address or domain is on spam, reporting of spam emails by the users, the number of emails deleted without being read, the number of emails sent, etc (Iankovets, 2024). |
|-------------------------|--|

Moreover, Bawm & Nath (2014) has included the research in their study, where the study of thirty email marketing campaigns were analyzed to find out the factors which are linked with the higher response rates. The study shows that subject line, length of the email and the images were the factors, which were associated with the high response rates. According to the report of the Direct Marketing Association in 2012, 72% of marketers found that for building a relationship with their targeted customers, email was the best communication (Bawm & Nath, 2014).

2.7 Challenges and limitations

In the past years, companies were focusing more on how to obtain more new customers (Adlin et al., 2019). However, in the current scenario, companies are emphasizing making relations with the existing customers (Adlin et al., 2019). The study shows that this tool works in assessing customer loyalty and profits, which are measurable, like repetitive spending. As per the author, a CRM tool is the most effective way to maintain relations with customers. Adlin et al. (2019) highlight that the tool is especially made for individual employees or corporate departments in order to provide customer service effectively. Complementing this, the study of Cruz-Torres et al. (2021) shows that the use of the system has increased the performance capabilities of the company and its employees.

However, employees as well as the company may face challenges in CRM adoption. Research related to implementing CRM tool in banking industries conducted by Nepal (2022) found that the main challenges employees faces are secure system of data and

information (53%), difficulty in using the system (18%), employees are not familiar with the system (11%), and high cost is also a challenge in using the system. The study shows that employees (61%) were also satisfied with the results and the services of the tool.

Although these tools are an important strategy to improve customer relationships, increase customer loyalty and enhance the overall efficiency, there are always challenges in the adoption phase. Effective implementation of the tool can be disturbed by issues such as data security, high costs and complexity in using the tool. Employees also face a significant problem in the adoption phase.

Automation also has a negative relationship with email marketing, which reduces efficiency in email campaigns. Automation is dependent upon the data (Walz, 2025), and these analyze the effectiveness of the automation. While sending or exchanging data using an automation system, there may be a challenge of duplicate data (Skiera, 2022). Therefore, employees should always make sure that proper and regularly updated data are used to make email campaigns effective (Walz, 2025). When employees are using fully automated email tools, this can feel impersonal and may decrease customer satisfaction (Walz, 2025). The research shows that email campaigns and content may lack personal touches and may lead to robotic email content. Additionally, following data privacy issues on customers' privacy, such as GDPR, is another challenge (Skiera, 2022). In the marketing automation tasks, employees should be very careful while using customers' data and make sure that the data won't be leaked. Even a simple mistake may create legal issues, and an unauthorized person could misuse the data (Murin et al., 2024).

2.8 Development in Marketing Automation

Technological advancement has always brought unexpected and great change in the business. These kinds of advancement are making structural shifts in making changes in the business strategy (Kumar et al., 2019). In the current scenario, AI is making

advancements in every field by making innovative solutions, efficient processes and better decision-making (Stone et al., 2020). AI technology acts as an intelligence system that works by automating tasks and learning continuously to analyse the information and make decisions (Kumar et al., 2019). AI uses technologies like deep learning, predictive analytics and natural language processing (Ma & Sun, 2020). This helps marketers to predict the future and analyze consumer data with the help of personalized marketing campaigns (Kedi et al., 2024). Additionally, the authors note that AI is involved in automating activities such as collection, storage, management, and locating and finding of information (Kumar et al., 2019).

AI is making a huge impact in marketing and automation. In terms of marketing, AI is influencing more in personalisation aspects, which helps the companies to tailor their strategies according to the customers' behaviour (Kedi et al., 2024). The author further shows that AI helps in automating and optimising customised marketing, such as data collection, customer segmentation, personalization of the content and measurement of performance. (Olsen & Pracejus, 2020) supports this idea as AI helps in managing and planning marketing activities in the absence of humans.

As per Kumar et al. (2019), automation is helping and taking over the repetitive tasks, which reduces the time of humans and allows humans to emphasize on making strategy and creativity. The study shows that tools associated with AI, such as AI bots, help in tailoring recommendations and customer journey mapping. Additionally, the study shows that this task will continue in the future, where AI assists firms in predicting purchase behaviour by analysing huge amounts of customer data. The most used AI tools in marketing automation are HubSpot (Kedi et al., 2024). This study shows that it helps companies to attract, engage, and delight customers and provides automated marketing campaigns, predictive analytics, personalized customer journeys.

2.9 Theoretical framework

The theoretical framework helps in providing the structure of the motive of the study, research questions and especially methods and analysis (Grant & Osanloo, 2014). TAM and RBV are two relevant theoretical frameworks that help to analyze both the employee adoption side, like how they use automation in marketing, and the company's efficiency side, such as how using automation tools helps increase the efficiency in marketing activities. This study aims to combine these two frameworks to understand how user acceptance and resource utilisation help improve the efficiency of email marketing campaigns.

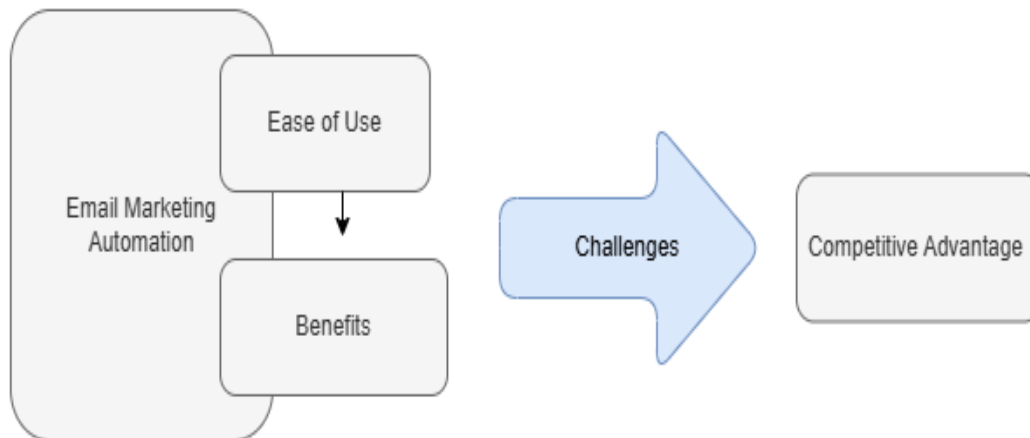


Figure 4: Theoretical Framework.

Email marketing automation is influenced by the ease of use, benefits and challenges as shown in Figure 4. Email marketing automation is influenced by the ease of use, benefits and challenges as shown in Figure 4. Automated email marketing helps the company to gain a competitive advantage through the ease of use (Harryanto et al., 2018) and the benefits that are achieved through its use. However, the success rate of the company is largely dependent upon the ease of use, benefits and its challenges. In email marketing automation, ease of use and benefits are related to each other, which determines the

value of a competitive advantage. The figure of the theoretical framework depicts that email marketing automation has a positive relationship with competitive advantage.

Additionally, when the employees use the simple interface of the system, it becomes easy for them to use it effectively. This can lead to achieving more benefits, such as personalization (Jarvinen & Taiminen, 2016) and segmentation (Morandhini & Dobrinić, 2018), which help in increasing efficiency and face fewer challenges. As a result, these benefits enhance long-term relationships with customers and performance. However, if the challenges are not managed wisely, they could hamper the effectiveness. In conclusion, there should be an equal balance of ease of use, benefits and challenges to achieve a competitive advantage.

3 Research Methodology

This chapter presents the research design, data collection methods, and data analysis of the study. The first part of the study explains the reasons for using the Qualitative research method. The second part of the study describes the methods for collecting the data. Finally, the last chapter describes the processes of analyzing the collected data.

3.1 Research Approach

The research is conducted using a deductive research approach that is based on the existing theories. A top-down approach which depends with the already known theories, and which is tested by using the data and observations to confirm the existing theories is known as deductive approach (Masud, 2025). In comparison, inductive approach is an approach in which new concepts or theories is created by reading of raw data (Thomas, 2006). This study explores all the theories that are related to the research area, such as marketing, automation and efficiency. After this, the study will form a research base for further study and data. That's why a deductive approach is suitable for this study. Lastly, the collected data are analyzed to test whether the data and theories support each other or not.

This study aims to answer how automation works in email marketing in the B2B market. It is further focused on the benefits and challenges that are created after the use of automation. For this reason, a qualitative approach is chosen to find the research gap. Additionally, a qualitative approach is chosen instead of quantitative because while using qualitative method, experiences and detail answers provide deep understanding and analysis instead of using numbers. The chosen method in this data collection allows for providing the depth of the experience of employees, whereas the quantitative approach lacks these features. For the qualitative data collection, semi-structured interviews were carried out as the primary data collection method. Semi-structured interviews are used in the study as this helps as an interview guide and is characterised by open-ended

questions (Busetto et al., 2020). With semi-structured interviews, the current situation of B2B market in email marketing has been analyzed especially the benefits and challenges of using automation. Additionally, how those roles of automation are related to the TAM and RBV.

3.2 Case Selection

This study has focused on email marketing automation, so five representatives who have been involved in or have experience in email marketing automation in the B2B market have been interviewed. Five companies were analyzed and all the chosen companies are involved in the B2B market in some way. Each of the companies analysed is operating in a different field from the others. One company operate within cloud IT solutions, and the second company operate within the fashion or retail industry, whose core business is related to wholesale and clothing. Similarly, the third company is operated in the medical sector, which specialises in selling medical aesthetic and orthopaedic products. The fourth company is involved in the education sector, where it provides academic programs and research services and works with B2B stakeholders, while the fifth one is operated within travel and tourism, whose core business is travel Bookings and tour services. The following tables provide a short introduction to the interviewee's workplace.

Table 4: Short Introduction of the Interviewee's workplace.

| Company Case | Industry | Core Business | Designation | Interview Duration |
|--------------|--------------------|--|---------------------------------|--------------------|
| A | Retail/Fashion | Wholesale and Clothing | Lead Full-Stack Developer | 33:39 |
| B | E-commerce/Medical | Sells medical aesthetic and orthopedic products | Email Marketing Manager | 28:41 |
| C | Technology | Cloud IT solutions and consulting | Head of Marketing | 26:03 |
| D | Education | Provides academic programs and research services | International Marketing Planner | 16:10 |
| E | Travel and Tourism | Travel bookings and tour services | Sales Manager | 17:20 |

The given table shows the interviewee's profile and the interview duration. Their years of experience in the related field is presented in the Appendix 2. Those participants have good experience and are actively engaged in the companies, whereas one of the participants is not currently working in the field but has five years of experience in email marketing automation. I have chosen these participants for the interview to gain practical insights into the company that have directly worked with automation tools and have enough experience to answer how automation is helping in providing good efficiency in the company.

I embraced network sampling for recruiting the interviewees. This method is also known as snowball sampling, where participants are referred by a known person. I asked the known individuals for the participant who has the required experience in email marketing automation. Meanwhile, I also recruited the participants from LinkedIn by publishing posts about such professionals in email marketing automation. The LinkedIn helped me to reach out to the experts with the help of the LinkedIn network. The post was being more engaged, and also references came from the existing contacts, which made it easy to find the participants. Therefore, it reduced my time in screening the large populations. However, this may result in sampling bias as people try to refer to those who are similar to them or who are known to them. This does not ensure randomness, which

limits generalization of results. Additionally, the final sample is more influenced by the first participant chosen and the LinkedIn network.

3.3 Data Collection

The primary data collection method used in the study was a semi-structured interview. The semi-structured interview was done with key participants from the selected companies to find out the role of automation in email marketing in B2B Interviews was chosen for the data collection because it is interactive and questions can be changed according to the contexts which can be easy for interviewee (questions (Busetto et al., 2020). The participants were from diverse backgrounds, such as different industries, job titles, countries of origin, and age groups. The inclusion of participants from various backgrounds has supported the study to make huge depth and validity. According to the study of Patton (2015), these kinds of variation help in capturing different experiences, needs and interpretations related to the automation. Therefore, this kind of variation helps to compare different interviewees' perspectives for agreements, which finally makes the study more reliable.

The interview was conducted remotely via Zoom. Before each interview session, the interviewees were asked about their availability to confirm the time, and the interview was done accordingly. Additionally, the interview questions and GDPR were sent to the participants for their convenience. Zoom was chosen for the interview as it was well familiar and accessible for participants for remote meetings from various geographical locations. Each interview was conducted for between 16 and 33 minutes. So, it was flexible for participants to share their views, experiences and insights about the use of automation tools in email marketing from the real-world experiences. All interviews were audio recorded with the consent of the participants. Additionally, the audio recordings were converted into verbatim transcripts, which helps to maintain accuracy and support for the analysis of data. In this way, this has made a good foundation for

the thematic coding, finding meaning and common trends or repeated themes in different cases.

3.4 Data Analysis

The collected data from the semi-structured interview is transcribed automatically from Zoom. After that, the data were prepared in Microsoft Word, and they were corrected and reviewed manually by the interviewer to ensure the correction of the data. After preparing the transcripts, the data were analyzed using a thematic analysis approach, which is followed by Braun and Clarke (2006). The collected data, interview transcripts, and notes were destroyed after thesis completion.

Thematic analysis is known for its flexibility and systematic approach, which helps the study in order to identify, analyze and report the created themes or patterns from the data. This method is suitable for exploratory research contexts. Thematic analysis uses its theoretical freedom in order to give flexible and useful research material, and offers rich and detailed results along with the difficult amount of data (Braun & Clarke, 2006).

The collected data were analysed by following the six-step framework proposed by Braun and Clarke (2006).

Familiarizing with the data

Firstly, being familiarize with the data that was collected from the semi-structured interviews by repeatedly reading the data and writing the initial ideas for coding.

Generating the initial codes

Secondly, the collected data were systematically coded by reviewing meaningful features among the whole dataset, and those data were grouped under each code to identify themes and patterns.

For example, “Automation handles repetitive tasks”, which is the statement from the interview, was coded as repetitive task automation, as this quote explains the tool’s ability to handle multiple tasks and reduce manual tasks. Similarly, the quote “It saves a lot of time and effort” was coded as time-saving, which reflects the idea of time efficiency while using the automated email tool. Another statement from the interviewee, “We don’t have to spend too much effort looking into things anymore”, was coded as reduced manual effort. This statement focuses on reducing the manual tasks of the employees in email marketing campaigns, which enhances efficiency. In this way, the collected data were given codes.

Additionally, the statement “30% contributes overall revenue by automation” and “We reach customers for offers or orders, it increases revenue for us and sends notifications for uncompleted orders” were coded as revenue contribution from automation and revenue increase from targeted communication, respectively.

Searching for themes

In this step, the identified codes were categorised under potential themes that provide meaningful patterns and codes were collated in possible thematic categories.

For example, similar codes such as repetitive task automation, time saving, and reduced manual effort were grouped in the same theme as automation as a tool for time efficiency. Similarly, the similar codes, such as revenue contribution from automation and revenue increase from targeted communication, were grouped together under the same theme as automation as a source of revenue growth.

Reviewing themes

Here, the identified themes were reviewed carefully across the whole dataset so that those themes accurately reflected the dataset. The identified themes were checked again with the original data in order to check consistency and coherence.

For example, the generated initial codes were ensured with the theme “automation as a tool for time efficiency” and were related to time saving and reducing manual efforts.

Likewise, the codes related to the theme “automation as a source of revenue growth” were ensured to be related to the revenue-generating efforts.

Defining and naming themes

In this step, each theme was clearly defined and specific and meaningful names were given to each category to ensure clarity and coherence. The example is given below.

Automation as a tool for time efficiency: This theme was named carefully as it refers to the ability of email marketing automation, which focuses on reducing repetitive tasks and manual efforts, and saves employees’ time with the automated processes.

Automation as a source of revenue growth: This theme refers to the capability of automated email marketing to increase sales and revenue through automated customer follow-ups and communication.

Producing the report

This last step provides the final report, which presents the themes supported by the interviewee quotes and relates them to theoretical insights.

For example, the findings show that automated email marketing enhances time efficiency, as interviewees state that “it saves a lot of time and effort”. This reflects the ability of the tool to save time and reduce efforts.

Similarly, the findings show that automation helps in increasing the overall revenue of the business. As per the quote of the interviewee, “30% contributes overall revenue by automation”, the tool helps in enhancing the sales.

3.5 Assessment of the quality of the data

When there is consistency in results with the same method and analysis, it is called reliability in the research (Saunders et al., 2007). The study shows that in the qualitative method, it's difficult to judge because of people's experiences and situations. Similarly, the study shows that people's opinions can be different, and even while repeating the same interview, the results might be different. However, the study can be reliable if the researcher gives accurate data and explains clearly the data collection and analysis process (Saunders et al., 2007).

In the context of this thesis, to make the study reliable and minimizing participant errors, all interviewees were given the description of the data protection rules and the interview themes before the interview. The interview was semi-structured, and it was followed throughout the interview (Appendix 1). All the interview participants were informed about the confidentiality, and the answers and the identity will remain anonymous. The reason behind this was to encourage them to give honest and transparent answers. Additionally, this thesis has included a clear description of the way of recruiting participants, their companies, and their roles in the company (Appendix 2).

According to Saunders et al. (2007), validity refers to the findings from the data analysis, which suggests how accurate the results are. The study also shows that generability is related to external validity, which suggests whether the findings can be used for other populations. In this thesis, validity includes that all the information that is collected through the interviews is accurate. These informations reflect the perceptions and experiences of people who are using email marketing automation tools. The interview of five different interviewees from different backgrounds, while having various experiences, helps to strengthen the validity by providing wider perspectives on the role of automation tools.

4 Findings

After the data analysis, this section presents the main findings of the study, which provide insights into how email marketing automation influences the efficiency of the company. The findings of the data are closely related to the conceptual framework, which focuses on the role of automation tools in email marketing efficiency.

4.1 Role of automation in the efficiency of email marketing

This section presents the analysis of how automation contributes to the efficiency of email marketing automation in B2B marketing. By taking the insights from the interviews, the findings show the way in which automation is actually helping automation users or marketers in time management, handling repetitive tasks, shifting to other roles and enabling personalization communication. Additionally, the challenges and future trends are also included in the analysis. The main identified themes created from the data are presented in the following subsection.

4.1.1 Automation as a tool to improve efficiency

The findings show that email marketing automation is regarded as a significant tool to enhance the efficiency of email marketing activities. All interviewees emphasized on improvement of time efficiency, faster response rates in the campaigns, and reduced repetitiveness and manual work with the use of automation. Email marketing automation tools have special features to handle repetitive tasks done during marketing campaigns or any other tasks.

“No one has to sit in the Excel files and emails. It just saves a lot of time and effort.”

Interviewee 1

“Before using automation tools, we used to send emails to all customers one by one, and that had a problem like you have to spend a lot of time, complex stuff, mistakes, and a lot of time-consuming.” Interviewee 1

“Once we have set up everything, it just runs by itself. We don’t have to spend too much effort looking into things anymore.” Interviewee 2

The above-mentioned quotes strongly suggest that automation significantly increases operational efficiency in email marketing. The interviewees have given more focus on the reduction of manual and repetitive tasks. Therefore, automation is regarded as both an efficiency and an essential tool in current email marketing activities.

Email marketing has made lots of improvements after using automation. The comparison was made before and after using the automation in email marketing. All interviewees agreed on the advantages and improvements in the tasks after using the automation tools.

“If there is no automation, email marketing does not exist. It's not possible for humans to send 5000 emails every single day or every single hour.” Interviewee 1

Moreover, the finding also suggests the need for automation for scalability. Email marketing automation not only saves time and effort but also helps in large-scale marketing activities, which would not be possible without using automation tools. These findings clearly show that automation really works to increase the efficiency in the daily work of the employees.

4.1.2 Automation as a tool for generating customer insights

The interview suggests that automation helps in customer behaviour analysis, which is essential in B2B contexts. Email marketing automation tools track each and every activity of the customers, which helps marketers in behaviour analysis. Automation sends trigger automation to customers in regular campaigns. According to one of the interviewees, in order to track the performance, WebBooks is used to track the customer activities. This tool has been used in order to detect the dead users and track those active ones.

“Automation helps in understanding customers and delivering what they want. One single email can give you a lot of information about customers.” Interviewee 1

One of the interviewees has given an example of how they tracked the customer when the tariff was imposed by the USA on China.

“We faced a lot of problems because of Trump's tariff on China. So, people were avoiding buying from China. And when we send the promotional email, we can exactly see the same behavior in our customers, that less than 5% people are actually coming to the website to see the new products. Then we internally can plan what is happening and then we try our approach. We send another email to our customers and we can see if the progress is from 5% to 10% or 15% or 50% or something. And exactly we knew the plan that we have made for this situation, is it correct or not? If we see that there is less responses, then we can alter this, what you can say, we can alter this situation for us and make a new plan and try it again. And how it is possible because of automation.” Interviewee 1

These quotes suggest that automation is not only a tool to save time, but it is also a useful tool to learn more about customer behaviour. Automated email marketing helps to make continuous data collection from the customers, even with small interactions

such as email engagement via open rates, clicks, and responses. These small actions give valuable information about the needs and interests of the customer. Additionally, performance tracking is helping to provide a lot more information about the customer behaviour. Therefore, automated emails are also emphasized on building long-term customer relationships.

“I can customize and personalize it much more based on the information that I get from the leads.” Interviewee 4

“We can just make the plan and just instantly send it to all our customers and we can instantly see the responses automatically of because of this email and other metrics that we are using. So, it helps us a lot to understand our customer behavior, understand our product's demand, understand which product is trending to our customers, which products they are liking, which products are not.” Interviewee 1

Interviewee suggests that segmentation, performance tracking and personalization help in transforming raw lead data to actionable outcomes. The interviewee focuses more on “based on the information”, which demonstrates that automation helps in tailoring messaging strategies. Additionally, personalization is based on the data that is collected from customer activities such as clicks, downloads, and past interactions. This helps to understand, identify and analyze the customer’s preferences, interests, and decision-making way.

“Automation makes my customer experience better, the information they get is relevant and helps them in their jobs and not everything spammed from us. For example, if I go to a webshop and buy myself a pair of boots, I don't want to get messages on all the clothes after that, but it should be something that interests me.” Interviewee 3

As per the interviewee, automation helps in enhancing the customer experience by providing them with information that is relevant and useful to their jobs rather than sending unnecessary emails. This suggests that email marketing automation helps in connecting the customer focus by sharing meaningful emails only, which avoids irrelevant communication.

4.1.3 Automation as a tool to provide ease of use

The interview suggests that using the automation tools in email marketing is often easy. The employees find it easy to use in the starting phase. However, it is essential to provide basic training to use the system. Employees who already have a technical background find it very easy to use. However, those employees who don't have any technical background need basic training to use.

"it's very comfortable to use". Interviewee 5

"Very easy to use, ticker more things to set up, some are user-friendly than others. Of course, you need to learn to do automation, easy but depending upon the person." Interviewee 3

Several participants suggest that automation tools are generally easy and comfortable to use, especially when users have basic knowledge and experience to use the system. However, in automation tools, some of the simple functions are regarded as user-friendly and provide an interface for simple campaign management. Whereas more advanced features can be difficult to set up, and this needs to be learned and practised. In a nutshell, ease of use depends upon the individual's skills, ability and familiarity with the automation system, and also the platform design.

"Sometimes the fastest and the easiest way then is to do the traditional email marketing." Interviewee 4

However, one of the participants added that automation is not always regarded as the easiest option to use. In some situations, such as when quick action or a decision is needed, traditional email marketing can be simpler and less time-consuming.

4.1.4 Automation as a tool for role transformation

The interview suggests that email marketing automation has helped to reduce manual tasks and handle repetitive tasks. As a result, this has saved a lot more time, and employees can emphasize on other skilled work. They can utilise their time in something useful in the company.

“It has shifted my role from manual execution to strategy, instead of manually sending emails, managing excel lists I focus on data to see which pre-orders are attending”. Interviewee 1

This quote explains the shift from manual tasks to strategic work. The interviewee has explained that after using automation, his work shifted from roles involved in handling repetitive tasks and time-consuming tasks, such as sending emails manually and managing Excel lists. Additionally, with the help of automation, these kinds of tasks are handled, which makes them free, so they can focus on analyzing data, such as tracking pre-orders.

Moreover, this role shift is essential as it helps employees to move from executing tasks to decision-making roles that are based on insights. They can use the data received from the automated tasks to inform marketing actions and enhance the outcomes rather than just performing tasks. Therefore, this shows that automation helps in shifting roles to make them more value-driven and decision-oriented.

“Comparing to the old time, if I want to send invitation to the customers for the webinars, I would need to go webshop and download all those emails from there and use traditional email providers to send them messages. But now with the automation I just need to pick up who has downloaded the guide and send them invitation”. Interviewee 3

“In the point of view of employer, it can help to proper staffing, like same person have more time now and now he can do marketing stuff in few hours and rest of the time, he can do sales. Without the automation he can't have enough time for other than marketing, even if only one guy is enough or if they need to hire more for the same task of marketing. Furthermore, it will help to get reach to a big mass, and fully use of data, not only in email marketing but also in sms marketings.” Interviewee 5

In a nutshell, using automated email marketing transforms employees' roles from performing manual tasks to strategic and value-added tasks. Additionally, automation helps and makes employees free to emphasize on data analysis and decision-making by handling the manual and repetitive tasks. As a result, this increases efficiency as well as allows the company to allocate resources more effectively. Furthermore, this helps to reach more customers and leverage customer data for insight-related strategies.

4.1.5 Automation as a source of revenue growth

Automation has emerged as the most used tool to increase revenue in the business. With the help of automation, marketers use performance tracking, trigger emails, and segmentation to reach out to customers about their products and services. Therefore, the continuous information given to the customers finally helps in revenue growth.

“30% contributes overall revenue by automation”. Interviewee 2

The interview suggests a clear indicator to analyze the impact of business performance and revenue growth. The above quote provides a quantitative measure which could be used in the calculation of total revenue that is generated through an automated process. Hence, this helps to make a direct analysis of the financial analysis of automation in the business.

“We reach to the customers for offers or orders, it increase revenue for us and send notifications for uncomplete orders.” Interviewee 1

“In B2B, you have to use all data that is on the current customer... message needs to be different from the person who already bought something”. Interviewee 3

Additionally, the email marketing automation helps in contacting customers with special offers, discounts or reminders, which can enhance sales. The sales could be measured by how well it works by analyzing the performance tracking activities, such as click rates of messages, notifications, unfinished orders and special offers. Therefore, the tracked numbers help to understand and analyze the effectiveness of automated messages in generating revenue for the company.

Moreover, personalized messages help in generating revenue and improving business performance. Personalized messages easily target the right audience and avoid sending them irrelevant information. This contributes to more conversions, more engagement of customers and better customer retention, which directly leads to revenue growth. Meanwhile, tracking performance and data-driven decisions helps to enhance efficiency and competitiveness, which overall improves business performance.

4.1.6 Automation as a source of competitive advantage

In email marketing, automation has played a vital role in creating a competitive advantage for the b2b business. One of the interviewees focused on automation, which has helped in identifying customer behaviour, which is a great competitive advantage for the company. Additionally, it has also increased the reputation of the company as automation has been made in a way that works in proper ethics.

“Automation allows to launch preorder campaign and always deliver in email with proper ethics.” Interviewee 1

“Competitive advantage through faster communication.” Interviewee 5

The interview suggests that automation serves as a source of competitive advantage in the company. One of the interviewees notes that ethical communication, understanding the customer and faster interaction with the customer also help in achieving a competitive advantage. Automation helps companies through email marketing to make communication in a responsible and proper way. Additionally, timely and appropriately sent messages help businesses to enhance trust and build strong customer relationships.

“You know more about the customer, that is more competitive advantage. For example, if I as a customer go and sign up to a webinar, and after that, order a newsletter, then company has an opportunity to contact me all the time when they have something that is interesting for me. And seller can use this as their advantage. They see from the customer profiles which webinars they have been into, for example, so they know that this customer these topics. So, when they have sales meeting next time with the customer, they can ask about their needs in that area.” Interviewee 3

Additionally, one participant strongly supported that automation helps companies to get a competitive advantage when companies respond and communicate with their

customers very often and quickly. With the help of automation, businesses can get connected with customers by using personalization and performance tracking features. This helps to make quick communication and engage customers by giving them the right information at the right time. Therefore, these findings show that competitive advantage can be gained by improving communication speed, improving customer insights, and organizing effective and ethical marketing campaigns. Finally, these help companies to get efficiency in marketing activities and a competitive advantage.

4.1.7 Challenges of automation

Along with the benefits provided by automation, there are some challenges as well. Many interviewees note that the automation costs a lot in the installation phase. Additionally, even while using automation, there is a challenge in ensuring that emails reach and appear reliably in the customer's inbox. Also, there is a problem when some email providers like Gmail change their algorithms. Hence, it's difficult for marketers to control delivery.

"It is really time-consuming to set it up." Interviewee 5

"Sometimes the fastest and the easiest way then is to do the traditional email marketing." Interviewee 4

The interview suggests that creating automation processes can be difficult technically. While using automation, users must create triggers, customer journeys, segmentation and personalization. These needs both strategic planning and technical skills, which are very complex in this matter. That's why it may feel irritating for some marketers, and they could prefer traditional email marketing. Hence, this leads to slowing down the implementation and use of email marketing automation tools.

“It is not as easy today with email marketing. In EU, there is more rules such as GDPR on how you can keep your list of permission and stuff like that.” Interviewee

3

Additionally, GDPR and data privacy have been another challenge for users. The interviewees are concerned about the General Data Protection Regulation (GDPR), which makes strict rules and requirements about the method of collecting customers' data, the way of storing and using it for marketing purposes. Additionally, automation tools are totally dependent upon the customer data provided to them, such as customers' email addresses, segmentation files, and performance tracking. This dependency has raised concerns about the data security, transparency and consent management. Therefore, automation users might face uncertainty in using automation features, which can lead to improper use of data that may cause legal risks and reputational damage.

“And that can happen if you, for example, accidentally use a wrong audience in your database. For example, I could choose, for example, the security buyers and send them an intranet message. Of course, they are like, why do I get an intranet message because they are not interested about that and haven't even might not have even heard that it makes them and so on. So that that is really easy to do, that kind of errors.” Interviewee 3

Furthermore, the interview suggests that misclassifying the audience in the database or data quality issues are additional challenges for email marketing automation. This can also be termed as database management and audience segmentation. Automation users or marketers rely on customer databases to target specific groups. In the meantime, if the customer data is wrongly listed in segmentation or in the audience list, emails can be sent to unintended recipients, which creates a problem. Additionally, this can minimize effectiveness of campaigns, create confusion among the customers, and finally affect the company's image.

“Another important thing is, receiver might feel lack of personal touch. In our industry, I feel personalization has a great impact on deals making because in our industry as a travel agency, we make sales of travel packages, meanwhile a lots of other travel agencies might be selling same tour/same travel activities. So, in that way you can say the personal touch is the key to make the deals close.” Interviewee 5

The interview suggests that there is a challenge in maintaining authentic customer relationships in email marketing automation. Companies use automation tools to send emails to customers on a larger scale, which may create confusion among customers due to impersonal or generic. Additionally, this may decrease customer engagement because they value communication, which makes them feel human and tailored, but not robotic communication. Furthermore, this is the challenge for automation users to maintain the balance between automation and personalization strategies. Hence, this can make automated emails feel relevant and meaningful to the customers.

4.1.8 Integration of email marketing tool with AI and other digital tools

The interview suggests possible future trends of automation by integrating automation with AI and social media platforms, which could help marketers to create marketing content and campaigns by using hyper-personalization AI across various platforms.

I believe that the future is hyper-personalizations by AI. So instead of, you know, broad segments or putting someone to think and brainstorm, AI will predict exactly which clothing items a specific retailer is likely to buy based on their past pre-orders, and it will generate a unique email just for them automatically. So, the future perspective is like a combination of this automation and email marketing and human intervention to AI. So, the replacement will be AI to do hyper-personalizations for a specific customer. Right now, even though we are personalizing the emails, but it's not fine-tuned for each customer.” Interviewee 1

“For me, the belief is that and for our company, we are focusing on that. We are trying to integrate AI with our automation. So, every single customer feels that it has a personal touch on that email and it connects them properly.” Interviewee 1

The interview suggests that email marketing automation could be integrated with AI to create hyper-personalization. AI has made huge impact on the marketing activities in the company and in the experiences of people. The features of AI hyperpersonalization is different from traditional segmentation. This new feature helps to create unique emails by emphasizing to each and every recipient by analyzing customer behavior, preferences, and the interactions with the customers made in the past.

This feature shows the effectiveness of work by AI, combined with automation and human intervention, to improve customer engagement, improve click-through rates, and improve and strengthen customer relationships. Additionally, this highlights the effectiveness of using predictive analytics rather than using manual targeting on the basis of data-driven marketing strategies. Therefore, this feature quickly helps to increase efficiency in email marketing campaigns more than before.

“I think as sales manager in the company, integrating email marketing tools with social media platforms could be essential future trend in order to leverage customer data and provide them highly personalized travel offers. This can help in connecting various platforms such as social media where customers are more engaged. Also, this can enhance the marketing results and make sales better.” Interviewee 5

Furthermore, the interview suggests the integration of an email marketing tool with social media platforms. This emphasizes the current trend of cross-platform marketing integrations. The method of integrating of email marketing tools with social media platforms helps to gather more customer data, track customer interactions, and gives more well-organized and real-time information. Besides this, it helps in making consistent

brand visibility and enable customers to see and receive messages across multiple digital tools. Hence, this integration helps in improving overall email campaign effectiveness.

In a nutshell, the future trends show that email marketing strategies in future can be made towards highly personalized and AI-driven communication on various digital platforms. Hence, the integration makes email marketing more efficient and increases customer engagement.

4.2 Building a figure about empirical findings

The findings of the study suggest email marketing automation as a powerful tool in order to improve efficiency in the company. Email marketing automation helps automation users or marketers to handle repetitive tasks, optimising work and focus on strategic tasks. Additionally, automation helps in customer-related insights with the help of its features such as segmentation, personalization, and performance tracking. These features all help in tailoring marketing strategies and campaigns, which finally help in achieving customer needs. Furthermore, automation's ease of use is helping marketers and users for accessible use and giving access for faster use and adoption among various groups.

Moreover, the findings demonstrate that automation works as a role transformation of employees. This is helping employees to shift their work from a manual effort to strategic and operational areas. The transition of the work contributes to the overall revenue growth and provides a competitive advantage as well as enhances business performance. Overall, this contribution is possible from the use of email marketing automation by enabling marketing activities or campaigns faster and more precisely.

However, the findings also show the challenges of automated email marketing such as data privacy concerns, difficulty in installation phase, and the feeling of lack of personal touch in communication with customers. These challenges could be minimized by following the future trends of the study, which suggests about the integration of AI with

automation. Additionally, the finding suggests to integrate with social media platforms and predictive analytics, which assists in enhancing engagement of the customers and effective campaigns.

Table 5: Research question in relation to the theoretical framework

| Research Question | Main Findings | Relation with theoretical framework |
|---|---|--|
| RQ: What is the role of email marketing automation in efficiency in B2B market? | <p>Email marketing automation improves organizational efficiency</p> <p>Helps in providing customer related information and improve organizational performance</p> <p>The tool helps in role transformation of employees from manual to strategic works</p> <p>Integration of AI with automation provides high personalized communication and enhance marketing effectiveness</p> | <p>Ease of use in email automation enhances operational efficiency</p> <p>Competitive advantage can be achieved through personalization and AI integration</p> <p>Automation makes better use of customer data and enhance customer relationships</p> <p>Effectiveness of automation is influenced by the challenges</p> |

In a nutshell, the findings highlight the use of email marketing automation, especially in increasing efficiency in the B2B market. Additionally, the given results are closely aligned with the theoretical background and highlight the importance of ease of use, competitive advantage gained, better use of customer data and wise management of the challenges.

In the figure given below, the revised theoretical framework also focuses on the overall benefits of email marketing automation. The figure is expanded from the original theoretical framework by adding some key factors which are identified from empirical findings. The given framework shows the relationship between email marketing automation and organisational efficiency, which creates a competitive advantage. Additionally, the benefits include enhanced time efficiency, improved personalization, segmentation and performance tracking. In the figure, ease of use is shown as the enabling factor, which

helps in using automation tools by providing a simple user interface, a simple campaign, and it is also dependent upon the person's knowledge to use the system. Additionally, the given benefits directly affect the organizational efficiency, revenue growth and competitive advantage. Meanwhile, the challenges related to email marketing automation, such as privacy concerns, data quality, and loss of personal touch, may negatively impact the effectiveness of email marketing automation in the B2B market. Therefore, to achieve a competitive advantage in the company, it is essential to make balance between ease of use, benefits and challenges of email marketing automation.

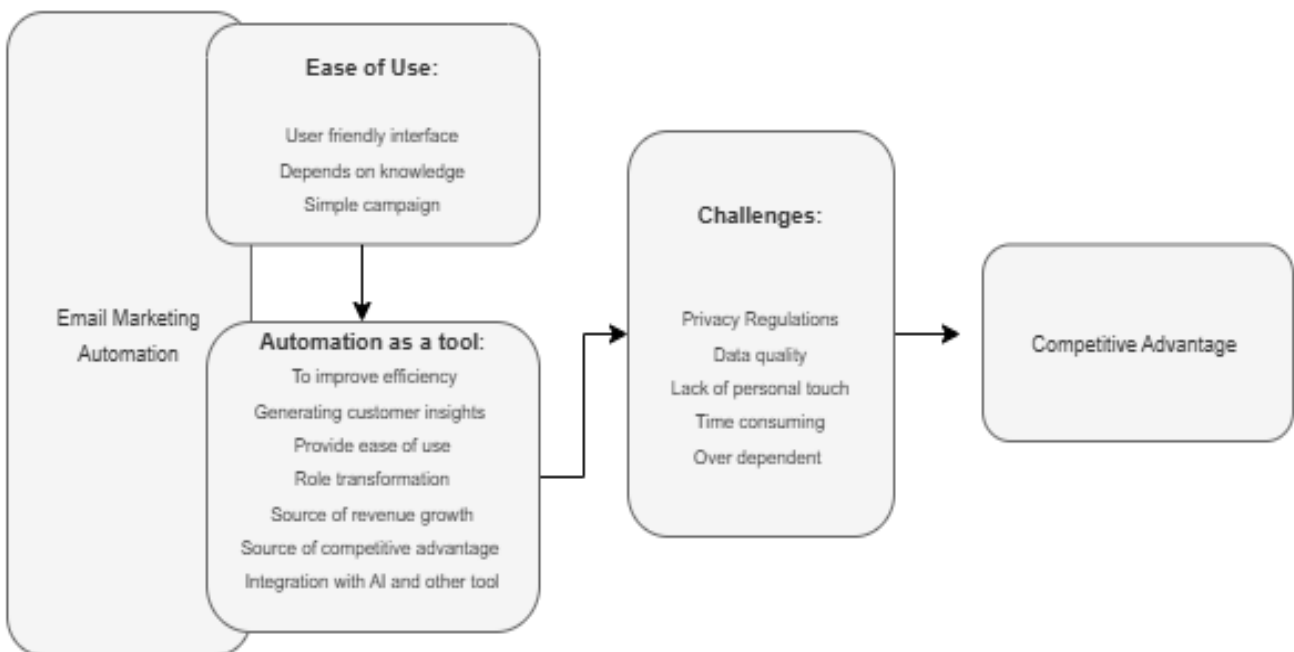


Figure 5: Revised Theoretical Framework.

5 Discussions

5.1 Theoretical contributions

This discussion section provides a comparison of the literature, theory and the findings that were prepared after the data analysis. This research demonstrates that email marketing automation is not only a tool for enhancing efficiency but also assists in shifting manual work to strategic work. The study has contributed to the literature on email marketing automation by demonstrating how automation enhances operational efficiency and strategic tasks in B2B marketing. The literature and findings provide many similarities about the automation tools. The tool is helping in campaign management, email marketing, and lead management, to manage customer interactions with organizations very effectively (Todor, 2016). The findings align with (Mohamed & Sofian, 2025; Buttle & Stan, 2015), who have focused on how automation enhances efficiency and assists marketers in focusing on strategic activities.

Additionally, the study has focused on the role of automation in making customer-related information and data-driven marketing practices. The finding suggests that using the features of automation, such as segmentation, personalization, and performance tracking, allows marketers or automation users to deliver targeted and relevant communication. This is done on the basis of customer behaviour and engagement history. Automation can be used in analysing customer behavior using personalization, segmentation and performance tracking, which aligns with the claim made by (Järvinen & Taiminen, 2016; Meyer, 2025). These automation features help in increasing conversion rates, customer experience, and maintaining customer relationships, and this aligns with the literature of (Corsaro et al., 2021) who have emphasized on the value of personalized marketing and practical use of CRM-integrated automation tools.

Furthermore, the findings contribute to the literature of (Uyanik, 2023; Harryanto et al., 2018) in the framework of the Technology Acceptance Model (TAM) and the Resource-Based View (RBV) on which the research is based. It is aligned with these frameworks by

demonstrating that email marketing automation helps to increase efficiency, reduce manual work and allow strategic tasks. This provides customer-related information with the use of its features such as segmentation, personalization and performance tracking, which aligns with the theoretical claims made by (Järvinen & Taiminen, 2016; Defau et al., 2023). Additionally, the findings highlighted that automation helps automation users or marketers in shifting their role from manual to strategic work. This kind of transformation helps in strengthening capabilities and competitive advantage. This perfectly aligns with claims made by (Barney, 1995; Todor, 2016). Moreover, this finding also aligns with the argument made by (Georgescu & Teiu, 2020).

Lastly, the identified challenges, such as GDPR compliance, data quality problems and workflow difficulties, can make automation processes difficult and may increase the company's responsibility. The challenges suggested in the findings align with the claims made by Meyer (2025). Although these challenges hinder the performance of organization, the future trends, as given in findings such as integration of AI, predictive analytics, and social media platforms, could be used. These solutions provide huge potential to eliminate those challenges. Altogether, these new trends could enhance adoption, enhance effectiveness in campaigns, make strong customer relationships and engagement and increase personalization, which supports the argument made by Meyer (2025).

5.2 Managerial Implications

This study has provided various managerial implications for B2B marketers. The findings from the study have mostly focused on the managers who are aiming to improve efficiency and performance through email marketing automation. Firstly, the findings show the ease of use and its importance in adoption among various employees. Managers need to ensure that the automation tools used are user-friendly and give appropriate and adequate training to the employees. This practice could provide better ease of use for the employees. Organizations can get benefits by emphasizing on these aspects,

which can enhance adoption rates and enable employees to shift from manual and repetitive tasks to strategic and operational tasks.

Secondly, the findings suggest email marketing automation is not only a tool for efficiency but also a strategic resource which helps in achieving competitive advantage and strengthening organisational capabilities. Additionally, managers need to understand the importance of the tool and view it as an important part of the company's resources. These automated tools could enhance the efficiency of the marketing campaigns by using features such as segmentation, personalization, and performance tracking. Hence, this implication allows marketing teams or automation users to respond more quickly and effectively to the needs of customers, enhance marketing campaigns and their outcomes, and finally contribute to the overall revenue growth. Furthermore, when managers support employees to utilize and implement automation tools, these tools can strategically transform roles and increase organizational performance.

Finally, managers should be concerned about the possible challenges which are related to email marketing automation, such as data privacy concerns, difficulties in workflow, and loss of personal touch. This research provides strategies to reduce this kind of issue, which can be essential for managers, such as integrating AI, hyperpersonalization of AI, and social media platforms.

Additionally, automation contributes to both operational efficiency and long-term strategic success. Managers could ensure these successes by solving these challenges and adopting technological advancements. Therefore, these strategies could contribute to the company's sustainable growth in competitive B2B markets.

5.3 Limitations and suggestions for future research

While the study contributes to the various theoretical and managerial implications, it still has some limitations which should be acknowledged. Firstly, the study is based on a limited sample size. Total five interviews were conducted as a remotely, who have

experience in using email marketing automation. These small sample case could impact on generalizability findings. As a result, the findings may reflect the perceptions of a specific group of participants only and may not represent all organizations that use email marketing automation.

Secondly, the study is based on qualitative research and insights and is fully based on participants' perceptions and experiences instead of measurable performance data. The findings include personal experiences of the participants, which may not include or present the actual behaviour of all users. Although verbal quotations are included in the data analysis, there is still a chance of not receiving accurate results from the participants due to misunderstanding, social desirability bias and other factors.

Thirdly, the study is based on a specific organisation that uses email marketing automation. The findings demonstrate that automation users or marketers who have experience in the B2B context may not apply to all sectors. In addition to this, the marketing technologies and practices totally vary across different industries.

Finally, the findings of the thesis are based on the participants' experience where they have used current tools, technologies and the practices by marketers or automation users. However, the technologies and tools are constantly changing, and in future, there will be more new tools, smarter automation systems, and marketing strategies may differ. Hence, these changes may affect in the marketing tasks while managing campaigns as well as their efficiency. Therefore, the findings may not remain relevant in the long term.

Although the study has given various practical insights about ways of enhancing organizational efficiency using email marketing automation, there are still many areas that needs further study. Firstly, this thesis is based on only a qualitative method; future studies can adopt quantitative or mixed-methods, such as surveys, statistics or mixed interviews and numbers. This method may help to measure the relationship between performance indicators such as revenue growth, productivity, and customer retention and email marketing automation.

Secondly, the long-term impact of AI-driven email marketing automation based on customer engagement and organizational performance could be explored in future research. AI (artificial intelligence) is evolving more rapidly, so understanding how AI-based personalisation helps influence customer relationships and brand loyalty in the long term.

Furthermore, future research may focus on small and medium-sized enterprises (SME) on how they adopt and implement email marketing automation. Along with the adoption, future research could focus on the problems which they face during and after adopting the automated tool. Moreover, the comparative study can be made among various geographic areas or different industries such as B2C and large-scale industries, which could help in identifying variations in adopting, implementing, and the effectiveness of the email marketing automation.

Finally, integrated marketing strategies could be another future research area. This includes future studies on the integration of email marketing automation with digital marketing platforms such as social media and mobile applications. This research may provide deeper insights into how cross-channel marketing and its strategies influence efficiency and customer experience.

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Appendices

Appendix 1. Semi-Structured Interview Questions

Use of automation:

1. How does your company utilize email marketing?
2. Which automation tools does your company use?

Ease of use:

3. How comfortable are you with using automation tools for email marketing?
4. How easy or difficult was it for you to learn and use these tools?

Effectiveness of automation in email marketing:

5. Which features of automation tools (such as personalization, performance tracking) do you find the most useful?
6. How has using automation tools changed your daily tasks or responsibilities?

Automation as a resource capability:

7. Do you think automation tools help your company use its resources (like time, staff, or data) more efficiently? How?
8. How does your company support or encourage employees to use automation tools?
9. Do you think using automation gives your company an advantage over competitors? Why or why not?

Challenges:

10. What challenges have you faced while using automation tools in email marketing?

Future perspectives on Automation:

11. What do you think will be the future trends in automation for better use in email marketing?

Appendix 2. Interviewee's profile

| Interviewee | Industry | Year of Experience | Designation | Interview Duration |
|-------------|------------------|--------------------|---------------------------------|--------------------|
| 1 | Retail | 5 | Lead Full-Stack Developer | 33:39 |
| 2 | Medical | 4 | Email Marketing Manager | 28:41 |
| 3 | Technology | 16 | Head of Marketing | 26:03 |
| 4 | Education | 1 | International Marketing Planner | 16:10 |
| 5 | Travel & Tourism | 5 | Sales Manager | 17:20 |