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DIGITAL MARKETING AUTOMATION

Increased competition in an uncertain digital environment requires new approaches to improving marketing and business efficiency. Automation of business processes and marketing ensures management decisions aimed at improving customer experience by collecting, processing, and analyzing a huge amount of objective customer data from various sources and software services. For the company, it saves time and resources by automating routine processes, and, given the improved customer experience and corresponding loyalty of the target audience, it helps to increase the efficiency of marketing investments and improve the effectiveness of digital marketing (DM) and business. The article is aimed at substantiating the structure of a single user profile based on the integration of ESP and other DM software services with a CRM system. The hypothesis is formulated: creating a single user profile based on the integration of ESP and other DM software services with a CRM system by speeding up communication and improving customer experience will increase the efficiency of DM and business in general. The research was conducted using general scientific and special methods: analysis and synthesis, system-structural analysis, comparison, systematic, logical generalization of results. Considerable attention is paid to email marketing, which remains one of the most popular DM automation tools, as it allows you to smoothly guide the consumer through the

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АВТОМАТИЗАЦІЯ ЦИФРОВОГО МАРКЕТИНГУ

Посилення конкуренції в умовах невизначеності зовнішнього цифрового середовища потребує новітніх підходів до підвищення ефективності маркетингу та бізнесу. Автоматизація бізнес-процесів та маркетингу забезпечує прийняття управлінських рішень, спрямованих на покращання клієнтського досвіду шляхом збору, обробки та аналізу величезного обсягу об'єктивних клієнтських даних з різних джерел та програмних сервісів. Для компанії це дає змогу заощадити час і ресурси шляхом автоматизації рутинних процесів та з урахуванням покращеного клієнтського досвіду й відповідної лояльності цільової аудиторії, що впливає на збільшення ефективності маркетингових інвестицій, підвищення ефективності цифрового маркетингу (ЦМ) та бізнесу. Метою статті є обґрунтування структури єдиного користувацького профілю на основі інтеграції ESP та інших програмних сервісів ЦМ з CRM-системою. Сформульовано гіпотезу: створення єдиного користувацького профілю на основі інтеграції ESP та інших програмних сервісів ЦМ з CRM-системою завдяки пришвидженню комунікації та покращенню клієнтського досвіду сприятиме підвищенню ефективності цифрового маркетингу та бізнесу загалом. Використано загальнонаукові та спеціальні методи: аналізу та синтезу, системно-структурного аналізу, порівняння, системний, логічного узагальнення результатів. Значну увагу приділено email-маркетингу, який залишається одним з найпопулярніших інструментів автоматизації ЦМ, оскільки дає змогу плавно проводити



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sales funnel with a high return on marketing investment. The effectiveness of integrating a CRM system and an ESP is proved, due to the specialization and functional features of the latter in interacting with consumers via email. The technologies, stages and tools of DM automation are systematized. It is proposed to collect all information about a particular consumer in a single user profile. This requires finding a technical solution for each business process and connecting software services into a single digital ecosystem. Collecting information about the company's customers and their journey at all points of interaction in one place by integrating the services used into a single user profile allows you to make more effective decisions in marketing and business and achieve business goals.

Keywords: digital marketing, marketing automation, email marketing, email newsletters, emails, email campaigns, ESP, CRM, single user profile, digital ecosystem, technologies, processes.

JEL Classification: M31, M37, O33.

Introduction

Under the current conditions of uncertainty of the external digital environment and fierce competition, the effectiveness of companies depends on making management decisions based on the collection, processing and analysis of a huge amount of data. The spread of marketing automation in the digital environment is primarily related to the ability to save companies' time spent on processing a large amount of information and performing routine work. This directly affects the effectiveness of digital marketing (DM) and business as a whole.

Scientists mostly consider automation from the point of view of managing business processes of companies. Thus, in the study (Losheniuk, 2022) the functional areas that are most subject to automation in business are highlighted: procurement, finance, human resources management, sales and marketing. The article by Krause et al. (2022) is devoted to the study of the CRM system as a source of information for the development of marketing projects, automation and optimization of business processes from the standpoint of strategic management of competitiveness. Berestetska et al. (2023) analyze the problems of improving business processes using the CRM system, referring marketing to one of the key areas of automation in the company. These scientists identified the CRM system as the main automation technology. Different systems are compared according to their purpose and functionality.

споживача воронкою продажів за високої рентабельності маркетингових інвестицій. Доведено ефективність інтеграції CRM-системи та ESP завдяки спеціалізації та функціональним особливостям останньої у взаємодії зі споживачами за допомогою електронної пошти. Систематизовано технології, стадії та інструменти автоматизації ЦМ. Запропоновано усю інформацію відносно конкретного споживача збирати в єдиному користувацькому профілі. Необхідно для кожного бізнес-процесу знайти технічне рішення та з'єднати програмні сервіси в єдину цифрову екосистему. Збір інформації про клієнтів компанії та їх шлях у всіх точках взаємодії в одному місці завдяки інтеграції використовуваних сервісів в єдиний користувацький профіль надає можливість приймати більш ефективні рішення у маркетингу та бізнесі, досягати цілей діяльності.

Ключові слова: цифровий маркетинг, автоматизація маркетингу, email-маркетинг, email-розсилка, email-листи, email-кампанії, ESP, CRM, єдиний користувацький профіль, цифрова екосистема, технології, процеси.

The research (Mero et al., 2020) substantiates the cause-and-effect relationship between the implementation of marketing automation technologies, in particular CRM, with the expected target effectiveness of entrepreneurial activity in conditions of uncertainty of the external environment. The authors identify five key areas of marketing automation: customer knowledge, information systems infrastructure, analytics, interdepartmental dynamics, and change management. The scientific work of Silva et al. (2023) is dedicated to identifying the role of marketing automation in measuring profit from marketing activities; the authors highlight the strategic and tactical advantages of software implementation.

According to the results of the analysis of the mentioned sources, it was found that the main attention of scientists is focused on the functional capabilities of CRM systems and their contribution to increasing the efficiency of business activities and the impact on increasing the return on investment in marketing. The author fully supports the conclusions from the above studies. However, the formation of the optimal structure of various services that are integrated with CRM to create a single user profile in order to speed up communication with consumers and improve the customer experience remains an unsolved problem. In particular, in the mentioned studies devoted to marketing automation, email marketing is not presented as one of the powerful automation tools and the possibility of its integration with CRM is not considered. Solving this problem has a direct impact on increasing the return on marketing investments and business efficiency in general. In addition, the development of digital technologies used in the automation of marketing processes is of great importance for the development of the Ukrainian economy in the post-war period (Rudenko, 2023).

The aim of the article is to substantiate the structure of a single user profile based on the integration of ESP and other software services of the DM with the CRM system. To achieve the goal, it is necessary to perform the following tasks: identify the role of email marketing in automation and systematize digital marketing campaigns by email using ESP; present the order of integration of the CRM system and ESP; systematize technologies and stages of marketing automation and propose a structure of a single user profile based on the integration of various sources of information and services.

To realize the aim, the hypothesis was formulated that the creation of a single user profile based on the integration of ESP and other software services of DM with the CRM system, thanks to the acceleration of communication and the improvement of the customer experience, will make it possible to increase the efficiency of the DM and business in general.

To test the hypothesis, the following general scientific and special research methods were used: analysis and synthesis, system-structural analysis, comparison (to establish the relationship between the goals of the DM and types of e-mails; selection of types of digital marketing campaigns by e-mail using ESP; selection of evaluation indicators effectiveness of email

marketing); system (for systematization of technologies, stages and marketing automation tools, formation of a single user profile); logical generalization (formulation of conclusions from the conducted research).

In the three sections of the main part of the article, e-mail marketing is consistently substantiated as one of the most effective tools of DM automation, the types of e-mails are highlighted and described, and their relationship with the image and conversion goals of DM is established; digital e-mail marketing campaigns and e-mail marketing effectiveness indicators are characterized; the procedure for integrating the CRM system and ESP is substantiated and described; systematized technologies, stages and tools of DM automation; a single user profile based on the integration of ESP and other DM software services with the CRM system is presented; an example of a digital ecosystem of marketing automation of an e-commerce enterprise is given.

1. E-mail marketing and ESP

Email is currently one of the most popular DM tools, as it helps move the user from one stage of the consumer journey to the next, providing a high return on investment (Dice, Henneberry, 2020, p. 279). E-mail marketing as a DM tool helps companies to communicate with subscribers and customers through e-mail in order to build relationships and/or make sales.

In Ukraine, the most popular e-mail providers are Gmail, Outlook, UKR.NET, Yahoo! Mail, and others. (Sternenko, 2022). Yes, Gmail is convenient for those who use Google's digital products, enabling file sharing. A feature of Outlook is the possibility of integration with various third-party programs, in particular: Skype, Facebook, PayPal, Trello, etc., which allows an enterprise that uses many platforms to communicate with users to communicate with those that do not use directly Outlook. Gmail and Outlook providers have 15 GB of free storage. UKR.NET mail is most often used by representatives of small businesses, freelancers and self-employed persons. The storage size is 4 GB. A feature of Yahoo! Mail is a huge amount of storage of 1TB (terabyte), which allows you to attach attachments with photos and videos to emails and easily find everything sent during the entire time of using the mail.

Emails sent by companies, taking into account marketing aspects, are divided into three types (Dice, Henneberry, 2020; Rawls, 2020): promotional emails, relationship-building emails and transactional emails. Each type of letter is sent to a specific user with a specific purpose and at a specific time to advance them through the sales funnel and to build long-term partnerships.

Electronic newsletters present potential consumers, leads and customers (from the email mailing list) with a value proposition, that is, they promote an "offer". It can be: content that sells; a conditional offer with the aim of obtaining a lead contact, a so-called lead magnet, for example, a

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"white paper" (official and detailed guidance on any issue), a checklist, a webinar, etc.; information about the release of a new product or the introduction of a new service; event announcements; trial use offers; promotional offers; personalized offers for a specific consumer, etc. Email newsletters are the most common type of marketing email. According to statistics, 66% of users make a purchase directly after receiving a letter by e-mail (Dice, Henneberry, 2020, p. 281).

Relationship building emails provide consumer value to subscribers by offering free content or information. These can be: welcome letters to new subscribers; blog articles; poll; announcements about the competition, etc. Such communication makes it possible to build a deeper relationship between the consumer and the brand, because a person spends his time looking at the content of these letters and, provided that the content is correctly selected, interesting and useful, which is sent regularly, he gets used to such communication and even expects letters from the brand.

Transactional emails are sent in response to an action taken by the consumer during communication with the company: order confirmation, receipts, coupons with promotional codes, product shipment notification, account registration, product return, customer service message, password reminder, confirmation of termination of subscription, etc. Transactional emails have the highest open rates of the three email types and generate 2–3% more revenue than standard mass emails (Dice, Henneberry, 2020, p. 283). This is due to the fact that through transactional letters, the company broadcasts respect for its customers and continues the dialogue with them, without leaving a person alone without thanks or with unresolved problems.

In the *Table 1* it is presented the relationship between the image and conversion goals of the DM and the types of e-mails.

Table 1

Email types for digital marketing purposes

Marketing objective	Email type		
	Promolist	to build relationships	transactional
Customer support	–	–	+
Raising awareness of problems and solutions	–	+	+
Increase brand awareness	–	+	+
Getting new leads and customers	+	+	+
Onboarding of leads and customers	+	+	+
Sales of a key offer	+	+	+
Monetization of existing leads and customers	+	+	+
Building a community of brand promoters	+	+	+

Source: Adapted from Dice, Henneberry, 2020; Kotler, Cartajaya, Setiawan, 2020; Iankovets, 2023.

The automation of modern processes, the best practice of email marketing, the need to reduce the cost of working time and increase the efficiency of its use require the division of emails into two types depending on the way they are sent, namely on the degree of participation of the email provider (Voronyuk, Polishchuk, 2018; Dice, Henneberry, 2020; Rawls, 2020): mass and automatic.

Bulk emails are emails that are manually sent to all of a company's subscribers. They are sent not in response to any consumer actions, but at a specific time with a specific purpose. They include:

newsletters – sent out periodically (daily, weekly, monthly) to the entire subscriber base, provided that such a promise was made when subscribing to the newsletter;

marketing offers – only those basic marketing offers that can provide consumer value for all subscribers are sent to subscribers from the email mailing list. Other offers must be sent by segmented lists;

segmentation – one letter is sent to the entire list in order to identify the specific interests of certain consumers, after which the email list is divided into segments.

It is important for companies to keep people in mind and not annoy them with too many mass emails and thus not spoil the relationship with their consumers, which can lead them to break the relationship and unsubscribe from the email newsletter.

Most e-mails should be automated to optimize time spent and improve the effectiveness of e-mail marketing. After the content has been prepared and worked out, the mailing is transferred to the e-mail distribution service (ESP, Email Service Provider), which performs it automatically. It is important to set up automatic mailing correctly so as not to annoy consumers with an excessive number of letters that come to them in the mail. It is advisable to use automatic mailing for the following types of letters: a greeting to a new subscriber; a letter with a conditional offer; confirmation of registration; receipt for payment of purchased goods (services); segmented marketing offer; request to leave a review about the product, brand, company; reminders about products in the basket; restoration of relations with the brand, etc.

Sending e-mails is most effective when it takes place according to a developed annual calendar of promotion, which can be drawn up, for example, with the help of Google Calendar. The plan for each product shows the promotion objectives and corresponding KPIs (both financial and non-financial), as well as adopted and potential promotion activities. After the annual promotion plan is developed, monthly and quarterly plans are created based on it. Calendar scheduling allows you to evenly distribute different types of emails over a specific period of time, which keeps attention and engages consumers without the risk of overdoing the same types of emails or sending them too often, which can cause consumer irritation and unsubscribe.

In order to smoothly and delicately, without excessive and aggressive imposition, move consumers through the sales funnel, various types of marketing e-mail campaigns are used (Voronyuk, Polishchuk, 2018; Dice, Henneberry, 2020; Rindfleisch, 2020; Rowles, 2020):

educational (indoctrination, education, training): an automatic campaign, which is launched immediately after the subscription of a new person, with the aim of telling about the company/brand and assuring him that he made the right decision by subscribing to the email newsletter, joining, accordingly, to company/brand customer community. An email outreach campaign usually consists of one to three emails and introduces new subscribers to the company/brand on a deeper level. Educational email campaigns solve the following main tasks: to welcome new subscribers and introduce them to the company/brand; emphasize the benefits of subscriber status; tell subscribers what to do next; introduce subscribers to the individual characteristics of the brand;

engagement campaign: based on the subscriber's interests and automatically launched immediately after he performs a certain action. The goal of the campaign is to encourage the subscriber to convert by providing a personalized value proposition. When launching an engagement campaign, the company/brand must know the answers to the following questions: what is the next step expected from the consumer (register on the website, or accept a conditional offer, or make a purchase); whether the company/brand is sure that the consumer will take this step, whether he is ready for it (too much and too soon should not be offered, it can push the consumer away). Engagement campaigns solve the following main tasks: encourage subscribers to convert; taking into account the previously studied interests of consumers to move them to the next stage of the consumer's journey; take into account the previous positive action; prevent or overcome the most common objections to conversion; inform the next logical step; ask to make an order or the next step;

lift campaign: an automated campaign that is launched immediately after a purchase is made to convert customers into repeat buyers. This campaign is aimed at building a long-term relationship with the consumer, it solves the following main tasks: overcome or prevent the most frequent objections; inform the consumer of the next logical step; increase the average value of consumers by selling to them more and more often; increase consumer confidence in the company/brand; raise consumers to the level of brand advocates. For example, if a consumer bought a social media marketing training, he can be offered the next email marketing training with a corresponding discount;

segmentation campaign: this is the sending of electronic promotional letters manually to the entire base of subscribers with the aim of segmenting

the latter by interests. For example, an Internet agency plans to launch an online course on Internet marketing for different segments of its consumers: students, working marketers, and business managers. First, a letter is created with the announcement of such courses, which lists their advantages for different categories of consumers. The letter is manually sent to all the subscribers of the agency, and then the subscribers are segmented into three categories according to the transitions. Additional e-mails are prepared for each category, taking into account the interests of individual groups of consumers;

re-engagement campaign: an automated campaign in which emails are sent to subscribers who have not opened or clicked on previous brand emails in the last 30-60 days for various reasons. Re-engagement campaigns can get consumers back on the consumer journey again. But if some consumers still don't return after the campaign, their contacts should be removed from the mailing list and thus protect it from possible problems with non-delivery of e-mails.

Marketing email campaigns should be accompanied by an analysis of their effectiveness. The main indicators of email marketing effectiveness include (Voronyuk, Polishchuk, 2018; Dice, Henneberry, 2020; Rindfleisch, 2020; Rawls, 2020):

number of subscriptions;

the delivery rate of letters (Delivery Rate) – the percentage value of all letters from the mailing list delivered to the email inboxes of the addressees, regardless of whether they ended up in the "Inbox" or "Spam" folders;

indicator of open letters Open Rate (EOR) – the percentage ratio of the number of open letters and the number of sent letters;

unsubscribes and complaints (Unsubscribe Rate/Complaint Rate) – these indicators combine subscribers who no longer wish to receive letters:

Unsubscribe Rate characterizes the percentage of those users who unsubscribed from the newsletter in relation to the number of delivered letters;

Complaint Rate characterizes the percentage of those users who sent a letter to the "Spam" folder.

People's interests change over time, so unsubscribing from newsletters is a natural phenomenon. Along with unsubscribes, new subscribers also appear. More deeply, the effectiveness of email marketing and interest in the company/brand can be measured by comparing the percentage change in the number of subscriptions and unsubscribes. Growth in subscriptions must exceed growth in unsubscribes. For a brand, unsubscribes only affect the reduction of the subscriber base at the moment. But sending a letter to spam affects the reputation, which depends on the delivery of letters. If the Complaint Rate exceeds 0.1%, the next mailing may be blocked;

clickability indicators Click-through Rate (CTR) and Click through Open Rate (CTOR):

CTR is the share of users who clicked on clickable elements in the letter (link, image or button), relative to the number of delivered letters;

CTOR is the share of unique clicks relative to the number of open emails. The *CTOR* indicator makes it possible to more objectively assess the interest of subscribers to the newsletter, since its calculation takes into account the clicks of unique users on opened letters.

For example, 100 letters were sent in the newsletter, 50 of them were opened, 10 clicks were made:

$$CTR = 10 : 100 \cdot 100 = 10\%;$$

$$CTOR = 10 : 50 \cdot 100 = 20\%.$$

After improving the subject of the letter, the number of open letters increased to 70, clicks – to 14:

$$CTR = 14 : 100 \cdot 100 = 14\%;$$

$$CTOR = 14 : 70 \cdot 100 = 20\%.$$

When the value of the *CTR* indicator increases by 4 percentage points (from 10% to 14%), the value of the *CTOR* indicator remains unchanged (20%). This indicates that the interest of users in the letter has not changed in general, and the increase in the number of clicks occurred only thanks to a successful title. Therefore, to increase the effectiveness of the letter in the newsletter, you need to work further, perhaps on improving its content and/or design (checked with the help of A/B testing).

In addition to these indicators of clickability, e-mail distribution services show information on the number of clicks on each link in the letter, which makes it possible to identify the most interesting materials for users. This approach is also used to segment the target audience.

In general, the value of click-through rates depends on the market segment (for the b2b segment, the *CTR* value will be higher due to a more personalized approach), the type of business, the type of emails and other factors. Therefore, during the analysis, you need to focus on comparing the current values of the clickability indicators with your own previous values of these indicators. For example, if the average *CTR* was equal to 2%, and after conducting an email campaign it became 3-4%, it means that the campaign was successful. Or vice versa, if the value of *CTR* decreases to 1%, this will indicate that the campaign goals have not been achieved. It is also advisable to compare the values of these indicators with the average values by type of activity (consulting services, real estate, advertising agencies, beauty salons, car salons, etc.) to identify the best experience of competitors and own shortcomings compared to them, for improvement;

conversion rate (Conversion Rate) characterizes the share of users who performed the targeted action planned in the letter (purchase or order, viewing a certain number of pages on the site, registering for the event, etc.).

You can view the conversion rate in the Google Analytics 4 "Traffic Sources" and "Conversions" reports. Conversion depends not only on the email, but also on other factors: value proposition, design and quality of website content, convenient usability, etc. Therefore, increasing conversion is a systematic and integrated work of the entire marketing team. One way to increase conversions is to use a chain of letters, that is, several letters combined with one goal. One letter may not immediately lead to a sale, but it will heat up interest and, thanks to the second letter, the person will make a purchase. Therefore, it is considered more appropriate to calculate the total conversion of a chain of letters, and to analyze the opening and clicks for each letter;

reputation (Email Reputation) is a complex indicator that is calculated by e-mail distribution services and characterizes how much they trust the company/brand. It depends on whether the letter will end up in the "Inbox" folder or the "Spam" folder. The reputation is affected by various factors: the presence of the IP address or domain of the site in black lists due to spam; user complaints about spam; the share of emails that users delete without reading; regularity of mailings; content of letters; references in letters; EOR and CTR indicators; answers to letters, etc. That is, the reputation depends on the actions of the company/brand when using email marketing and the corresponding reaction of subscribers. As a rule, not all mailings are blocked, but a part of them, so you need to analyze the reputation and, having noticed that 2–5% of emails fall into spam, look for the reasons and eliminate the identified problems.

All of the indicated indicators of email marketing effectiveness are calculated by email distribution services and presented in the corresponding reports.

The use of ESP allows speeding up this process thanks to its automation; increasing the reputation and guaranteeing of letter delivery; collecting statistics and analyzing the effectiveness of email campaigns. Popular mailing services in the world and in Ukraine are Sendpulse, Mail-Chimp, Campaign Monitor, UniSender, GetResponse, eSputnik, Zoho Campaigns, Selzy, and others (Hostiq, 2023). Each of them has its own functionality, cost, advantages and disadvantages, and the choice of service depends on the goals and tasks of email marketing and the resource capabilities of the company. It is also important that e-mails are fully optimized for different screen sizes, since most of them are opened from mobile phones these days to monitor incoming correspondence and urgent responses.

When choosing a service, it is important to take into account the possibility of accessing information about users and their interaction with the company's website, that is, the possibility of integration with the CRM system and other platforms.

2. RM system and ESP Integration

CRM (Customer Relationship Management) is an approach to doing business based on managing relationships with customers. A CRM system is a database, a place where all contact details and information about all interactions of each lead and customer with the company are stored throughout the customer's life cycle. The main goal of implementing a CRM system in the company's activities is to build a strategy of interaction with customers based on consolidated information about customers and their preferences. Marketing and sales tasks that a CRM system helps to solve include: setting up a customer profile, integrating with a website to obtain leads, automating digital marketing campaigns, building and managing sales processes, improving the customer experience (Dice, Henneberry, 2020; Mero et al. al., 2020; Rawls, 2020; Krause et al., 2022; Berestetska et al., 2023; Silva et al., 2023).

The CRM system also stores data and the history of relationships with suppliers and partners, which allows solving many other business tasks, including: business process management, product portfolio management, document flow automation, working time management, optimization of communication within the company, analysis and visualization data and generating reports for making managerial business decisions, etc. (CREATIO, n.d.).

Common CRM systems used in Ukraine are OneBox, Zoho, HubSpot, Salesforce, ActiveCampaign, Creatio, KeepinCRM, Perfectum CRM-ESP, pipedrive, etc. The criteria for choosing a CRM system for a company are: compliance of the system's functionality with the company's needs; value propositions in packages to choose from and their cost; base capacity; integration possibilities with call tracking services, email marketing, social networks, messengers, chat bots, marketplaces, payment systems and other platforms; availability of analytical capabilities, dashboards and useful widgets in reports for sales and marketing departments, etc., depending on the needs of the company.

Marketing automation begins with the implementation of a CRM system, in which email marketing functions can be added through plugins. But using a CRM system to send e-mails from a company office IP address increases the risk of being blacklisted and blocked by the e-mail provider because CRM systems lack spam filtering (Rawles, 2020, p. 182). This drawback is eliminated when using ESP. In addition, ESP offers more specialized reports specifically for email marketing than you can get from a CRM system.

The joint work of the two services begins with the formation and transfer of lists of leads and customers from the CRM system to ESP and setting up automatic email campaigns. ESP, in turn, returns to the CRM system detailed information about the reaction of users to letters from the company. This is important, because if such information is not returned, it is

duplicated in two systems, on the one hand, and on the other hand, there will not be complete information in each system, which will limit targeting to the target audience in the future. Synchronizing data in the CRM system and ESP to prevent data duplication provides an opportunity to resolve provider blocking issues and send whitelists.

The integration of both services, among other things, makes it possible to collect information through ESP in the form of questionnaires and surveys and use it in various marketing actions through the CRM system and future email campaigns. More advanced ESPs integrate with a company’s website to view user behavior. This provides an opportunity based on the collected information to dynamically create emails and send them according to established rules.

The company’s use of various services logically requires their integration to combine data received from various information sources and create a single user profile, which is why marketing automation is used.

3. Technologies and stages of digital marketing automation

DM automation allows you to combine all points of interaction between the client and the company/brand into a single integrated and personalized process. Marketing automation involves the use of specialized computer programs and technical solutions for the automation of marketing processes, the transfer of the company’s current business processes to the field of digital services in order to save labor and time resources. The main idea of marketing automation is to eliminate the routine work of people and replace them with robots so that people can focus on highly intelligent work (Dice, Henneberry, 2020; Rawls, 2020).

Automation of routine processes takes place with the use of special software that analyzes customer actions and develops personalized offers based on the received objective data. In *Figure 1* presents a single user profile in which all information is gathered to make smarter and more informed marketing and business decisions.

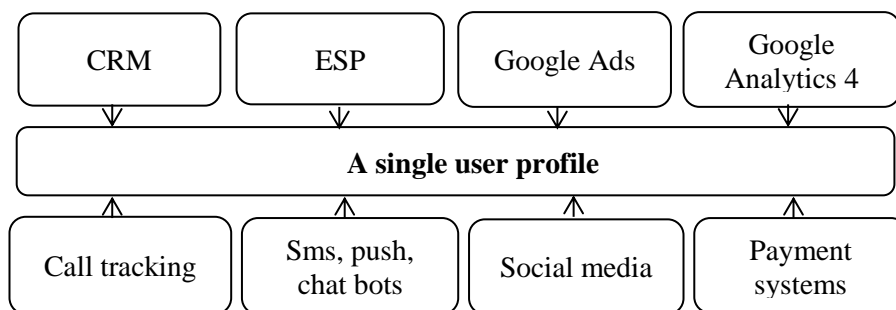


Figure 1. A single user profile based on the integration of various sources of information and services

Source: generated by the author.

The main marketing automation technologies include (Yankovets, Palicheva, 2020):

Site tracking is a technology that stores all the pages a website user has visited. This makes it possible to understand what the user is interested in, which sections of the site he visits more actively. Then, based on this data, you can build various automations and send personal e-mails. For example, the condition is set: "If the user visited page "A" on the site, e-mail No. 1 is automatically sent to him. If the user visited page "B" on the site three or more times, e-mail No. 2 is sent to him".

Lead Scoring (qualification of leads) is a technology by which it is possible to understand the degree of involvement of a lead and its readiness to make a purchase, it is a way to divide leads into "cold" and "hot". Thus, in a telephone conversation, the manager can feel the degree of interest of a person in making a purchase, which depends on his further arguments. You cannot see or feel a person's mood through the Internet, and with the help of web analytics, you can track the user's actions. The principle of Lead Scoring is based on the evaluation of user actions in points. So, a user's visit to the site is valued at 1 point; if the user opened the e-mail – he receives 2 points; clicked on the link in the letter – 3 points; visited the site again – 5 points. Depending on the number of points scored, users are divided into "cold" and "hot". E-mails, sms, push, etc. are sent to the "cold" ones. "Hot" calls are made by sales managers. The evaluation system can be configured in any way, depending on the tasks of the DM. Points are assigned automatically after setup.

Behavioral factors (Behavioral factors) are factors that result from the behavior of users, in particular: how a person behaves on the site; how actively communicates with the sales department; which pages are viewed. For example, ice, which visited the site 7 times in the last 2 days, is most definitely interested in the product. A lead that has looked at DM books 10 times is likely to buy a digital marketing book rather than a detective story; a lead that called the company three times or wrote to the mail is interested in the product (or, if it is a customer, maybe there is a problem that needs to be solved immediately). Accordingly, according to the behavior of a person, it is also possible to assign him points and classify him as a "cold" or "hot" consumer.

Geolocation factors – points are awarded depending on the company's focus on segments of certain territorial units.

Contact data is the data of the leads obtained by the system from the contact forms they filled out or provided their data to the manager by phone and he entered them into the CRM system.

Trigger marketing is a technology that allows you to communicate with the customer before and after the purchase. Triggered mailings are transactional emails or sms messages with special offers that are sent after a user activates a trigger. When using trigger marketing, the triggers can be:

the user opened/did not open the letter; clicked/did not click on the link in the email; visiting a certain page of the site; the number of visits to a specific website page; achieving a certain number of points using the Lead Scoring system; trigger depending on the stage of the deal; trigger based on date, time and day of the week; combination triggers, etc.

Marketing automation is a complex task that includes different stages. Each stage uses its own tools (*Table 2*).

Table 2

Marketing automation tools

Stage	The purpose of the stage	Instruments
Content creation and promotion	Generate and constantly update content on the site	Blog, services Semrush, Serpstat, Ahrefs, Majestic API, others (for competitor analysis), landing page builders, DMS
Advertising campaign	Find tools that will help make the advertising campaign more effective	Technologies that provide incoming traffic (Google Ads, Facebook Ads, Instagram Ads, LinkedIn helper), Programmatic, etc.
Lead conversion	Find tools to help collect contact information from users	Tools for obtaining contact data, communication channels (subscription pop-up windows, subscription offers, email, sms, push, chatbot), etc.
Interaction with leads	Automatically return the lead to the sales funnel through various communication channels, "warm up" him without the participation of people with the help of content	Email, sms, push, chat bots, calls
Lead management	Help managers optimize sales	CRM system, Lead Scoring, tools for lead movement through various stages of the sales funnel (email, sms, push, chat bots, calls)
Billing	Find a solution that will allow you to automatically accept payments on the site and transfer this data to the CRM system	Payment acceptance systems that must be integrated into the CRM system (PayPal, LiqPay)
Analytics of advertising campaigns	Measure the indicators and calculate the return of each advertising source/channel	Google Analytics 4, Google Data studio, Microsoft Power BI, OWOX BI, etc

Source: compiled by the author according to Mero et al., 2020; Rawls, 2020; Yankovets, Palicheva, 2020; Krause et al., 2022; Loshenyuk, 2022; Berestetska et al., 2023; CREATIO, n.d.

Marketing automation includes various processes that are solved by various programs and then collected in business analytics services (*Figure 2*).

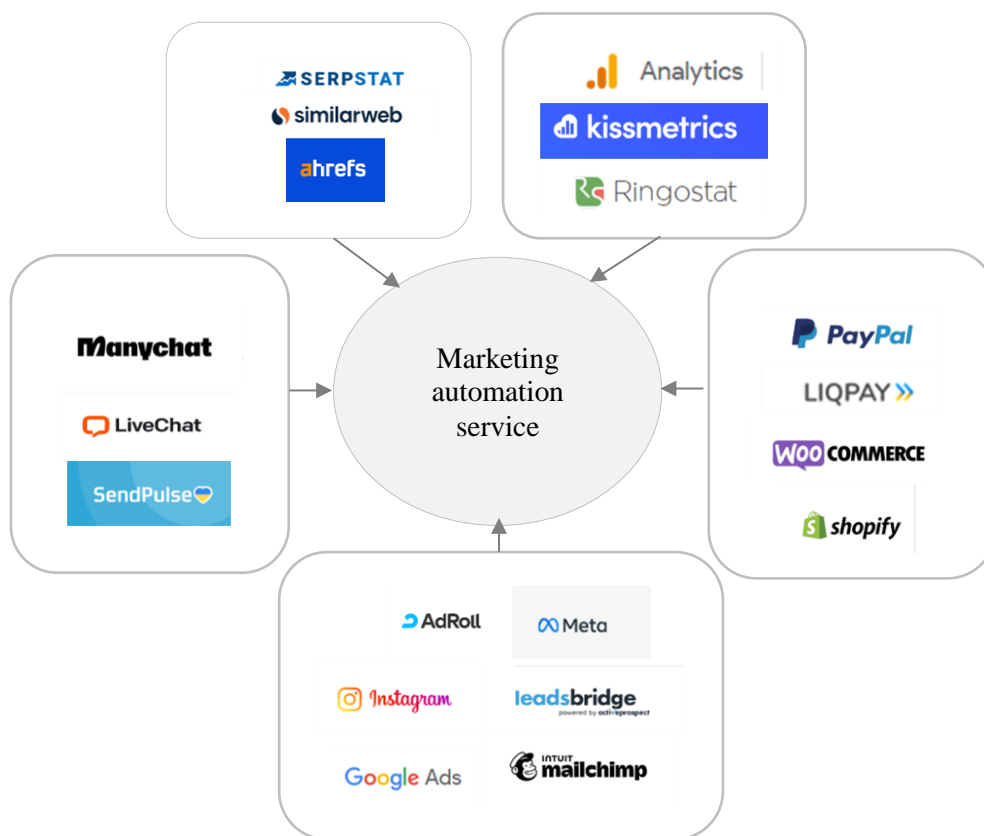


Figure 2. An example of an e-commerce enterprise/brand marketing automation ecosystem

Source: generated by the author.

There is no single software, single CRM system, single mailing service that will solve all business and marketing problems. It is important for an enterprise to understand its business processes, find a technical solution for each of them, and then connect software solutions into a single digital environment (digital ecosystem). Marketing automation is, in fact, an ecosystem that has a common connection through an API (an application programming interface through which different computer programs interact with each other).

From an implementation perspective, marketing automation and creating a single user profile is a challenging task. This is influenced by various factors: the cost of automation systems and the need to configure them; technical incompatibility with existing programs used by the company; establishing own rules, training people and continuous improvement. Therefore, the process from the start of work on the implementation of the automation system at the initial cost to obtaining a satisfactory result can last 1.5 years or more (Rawles, 2020, p. 190). But these difficulties, if the implementation process is properly organized, are temporary. Gathering information about the company’s customers and their journey at all points of interaction in one place thanks to the integration of the used services into a single user profile contributes to more effective decisions in marketing and

business. Thus, personalization and two-way dialogue with customers allows you to improve brand reputation, form and expand a loyal audience, which ensures the improvement of financial results and the development of the company/brand in the digital environment in the long term.

Conclusions

DM automation is driven by great competition in the uncertain market environment and ensures, thanks to the collection, processing and analysis of a huge amount of objective customer data, the adoption of management decisions aimed at improving the customer experience, reducing time and resources, which directly affects the improvement of the efficiency of digital marketing and business in general.

One of the most popular DM automation tools, which provides a high level of profitability of marketing investments, remains e-mail. The most common e-mail providers in Ukraine are Gmail, Outlook, UKR.NET, Yahoo! Mail. To build long-term partnerships with customers, companies use three types of emails: promotional emails, relationship-building emails, and transactional emails. Each of them is used to realize the image and conversion goals of digital marketing. Depending on the degree of involvement of the email provider, emails are divided into two types such as bulk and automated. Five types of digital marketing email campaigns are used to carefully advance the consumer through the sales funnel: educational, engaging, uplifting, segmentation, and re-engagement. The effectiveness of email marketing is measured using the following indicators: the number of subscriptions, the indicators of the delivery of letters and open letters, subscriptions and complaints, indicators of clickability and conversion, a comprehensive indicator of reputation. These indicators are calculated by email distribution services (ESP) and presented in the corresponding reports.

Marketing automation in the company begins with the implementation of the CRM system, the main purpose of which is to build a strategy of interaction with customers based on consolidated information about them and their preferences. The integration of ESP and the CRM system provides an opportunity to eliminate the shortcomings of the latter thanks to the ESP functionality, which improves interaction with consumers using e-mail: filtering spam, returning consumer reactions to letters, no duplication of data, the possibility of more accurate targeting of the target audience by identified segments, conducting surveys using questionnaires, creating dynamic e-mails and sending them according to established rules, etc.

DM automation ensures the unification of all points of interaction of the client with the company/brand into a single integrated and personalized process with the help of specialized computer programs and technical solutions. It is allowed to analyze customer actions and develop personalized offers based on the obtained objective data. To make effective and informed marketing and business decisions, it is important to collect all information about a specific consumer in a single user profile. Marketing automation is a complex task that includes various technologies and processes that are solved

by various programs and then collected in business intelligence services. The main ones include: CRM, ESP, Google Ads, Google Analytics 4, Call tracking, SMS, push, chat bots, Social media, and Payment systems. It is important for the company to understand its business processes, find a technical solution for each of them and connect software solutions into a single digital ecosystem. This will make it possible to simplify and speed up communication with consumers, which will improve their customer experience. In addition, it will save time and resources for the company due to the automation of routine processes and taking into account the improved customer experience and, accordingly, the increase in the loyalty of the target audience and the effectiveness of digital marketing and business.

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