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Marketing Automation & AI Report 2024

Tactics & Tools of AI-Based Lead Generation

A Study by ZHAW

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Management Summary

Three hundred and eighty-five companies from Switzerland and Germany participated in this study on the maturity of lead management. The study, which focused on business-to-business (B2B), was conducted between November 2023 and January 2024, and shows that using artificial intelligence (AI) in lead management is becoming increasingly important. In particular, the areas of lead research, lead generation, lead engagement, lead scoring, and lead automation were analyzed. Based on the results, the Lead Automation Maturity Index (LAMI) was calculated for each company, and recommendations for action were derived.

In the area of lead research, LinkedIn was found to be the most important source of contact data, with 58 percent, followed by events and personal recommendations. This finding underlines the importance of social networks and direct interactions in the B2B sector for data collection. Regarding lead generation, 38 percent of companies rate their strategies as successful but see further potential for optimization. In terms of lead engagement, it is striking that 41 percent of companies prefer personal interaction with interested parties. For lead scoring, it is worth noting that 56 percent of companies are still evaluating manually, indicating significant potential for efficiency gains through automation and AI. An analysis of the current situation reveals that despite advancing digitalization and AI-supported tools, personal interactions and networks still play a central role in lead management.

The findings in Section 3 underline the high transformative potential of artificial intelligence and automation for marketing strategies and customer communication. Companies that use AI technologies can significantly increase lead generation and qualification efficiency through more precise customer data analysis, improved predictions of customer behavior, and personalized marketing communication.

The most frequently mentioned AI use case in lead management is the automated personalization of emails and follow-ups for contact lists, which are increasingly being generated with AI. Most respondents see the recognition of a lead's readiness to buy through AI as an important use case. Almost half consider it beneficial to increase the deliverability of emails and engagement in social media using AI. Forty-three percent of B2B companies consider it worthwhile to adapt website content dynamically based on user behavior or, in 27 percent of cases, even create it individually. For 37 percent, it would be helpful to pass on ready-to-buy leads to the sales team automatically in response to AI-based lead scoring.

Almost half of the companies surveyed are still in the "learning" phase concerning AI. These companies want to understand how to utilize AI in their business and are exploring initial use cases. The other half is already in the "testing" phase. These companies carry out smaller pilot projects for specific AI applications. Only five percent of the companies are advanced in AI and already in the "scaling" phase. They have implemented AI tools widely in their business processes and are scaling up. Just seven percent do not have any confidence in AI.

The study results suggest that only a few companies currently benefit from the advantages of AI and automation in lead generation, although most respondents recognize the potential. The average LAMI is only 36 points on a scale of 0 to 100. Individual sectors – such as technology providers and consultants – and several other companies have progressed. However, Section 4 shows that the majority still have room for improvement in the five dimensions of LAMI. Limited resources and skills are by far the biggest obstacle to introducing AI in marketing.

Keywords: Marketing Automation, Sales Automation, Lead Automation, Lead Generation, Lead Management, Lead Research, Lead Engagement, Lead Scoring, Maturity Index, Artificial Intelligence

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Foreword by Marc Gasser

Welcome to the fourth edition of the Marketing Automation Report. This year, we are focusing on lead generation using marketing automation and AI. This report aims to analyze and harness the transformative potential of technology in our daily marketing activities.

In 2023, we experienced a **democratization of artificial intelligence** that was second to none. Mainstream marketing software such as HubSpot and lead generation platforms like Apollo added further AI functions to their solutions. New marketing tools have appeared on the scene and, last but not least, companies such as **OpenAI with ChatGPT** have given every individual and every company free access to technologies with the potential to make marketing operations more efficient and speed up business.

While the rapid development of AI technology for lead generation opens up new opportunities, it also presents companies with significant **challenges**. One of the biggest challenges is keeping employees up to date with the latest technology and developing their skills to use advanced technologies effectively. Added to this, producing content, finding contacts and email lists, and sending cold-call emails have never been easier or cheaper. However, these advances mean companies must navigate an increasingly dense **network of sales emails, product marketing, and inquiries**. Simply using modern tools is no longer enough. Companies need to refine and adapt their approach to make their lead-generation activities more valuable and relevant to their target audience.

The ideal solution to meet these challenges combines an **automated process** to effectively identify and engage potential customers and continuously fill the sales funnel with high-quality leads. It uses marketing automation to start personal conversations, qualify leads, and drive customer loyalty, with the key being the personalization and relevance of each interaction. Advances in AI make it possible to understand the target group better and personalize communication. A crucial point is continuous **lead scoring** to identify interested contacts quickly. This is particularly important in B2B, where purchasing decisions are infrequent and time critical. Regular interactions also help recognize a willingness to buy in good time.

To support companies on this journey, we present the **Lead Automation Maturity Index (LAMI).** This tool helps you evaluate your lead generation strategies and compare them with the industry standard to identify opportunities for improvement and adjust strategies. Visit our project website at www.marketingautomation.report and assess your level of maturity in lead automation at www.marketingautomation.report/benchmark.

At **Cotide**, we firmly believe in the power of technology to create authentic and valuable connections. Our aim with this report is multifaceted. First, we would like to offer you an insight into current trends and tools for lead generation, but we also show you how you can take advantage of these developments. This will improve your business and deepen relationships with your target audience.

Welcome aboard this exciting adventure as we explore the opportunities that marketing automation and AI offer for redefining lead generation and enriching customer relationships.

Best wishes

Marc Gasser

Cotide Founder & CEO

Acknowledgments

1 Research Method

This study examines the maturity level of participating companies' lead management in the five areas of "Lead Research," "Lead Generation," "Lead Engagement," "Lead Scoring," and "Lead Automation" – and the extent to which AI is already being used in lead management. As a result, a Lead Automation Maturity Index (LAMI) was calculated, and those companies were provided with suitable tools and recommendations for action. Most companies surveyed are based in Switzerland and Germany, with half operating in the information technology and services sector.

1.1   STUDY DESCRIPTION AND SAMPLE

The target audience of this marketing automation study was marketing and sales experts and members of the management of B2B companies with 50 or more employees. The study asked critical questions about where B2B companies stand today regarding lead management, marketing automation, and artificial intelligence (AI), what happened in 2023, what opportunities arise from AI, and what challenges those companies face.

The online survey was conducted over three months between **1 November 2023 and 31 January 2024**, and the data were collected online via the www.marketingautomation.report website. Of over 10,000 initial contacts, **385 participants** answered most of the questions. Accordingly, the sample size (n) is 385 unless otherwise stated in the figures. The survey was promoted by the authorship's network, namely the Institute of Marketing Management at ZHAW and research partners Cotide, Mayoris, atedo, webalyse, and Advanis.

1.2   ORIGIN AND SIZE OF THE COMPANIES

On the whole, participant companies are located in Switzerland (40%) and Germany (30%) (see Figure 1), the remaining 30 percent is spread primarily across England (8%), Sweden (6%) and Austria (4%). Table 1 shows further individual responses regarding the locations of the companies surveyed.

The average number of employees was 438 (ranging from 1 to 28,000), underlining the wide range of variation.

Figure 1: Location of the company of the study participants

COMPANY LOCATION

Location	Percentage
Switzerland	40%
Germany	30%
England	8%
Sweden	6%
Austria	4%
Portugal	2%
America	2%
Denmark	2%
Belgium	2%
The Netherlands	2%

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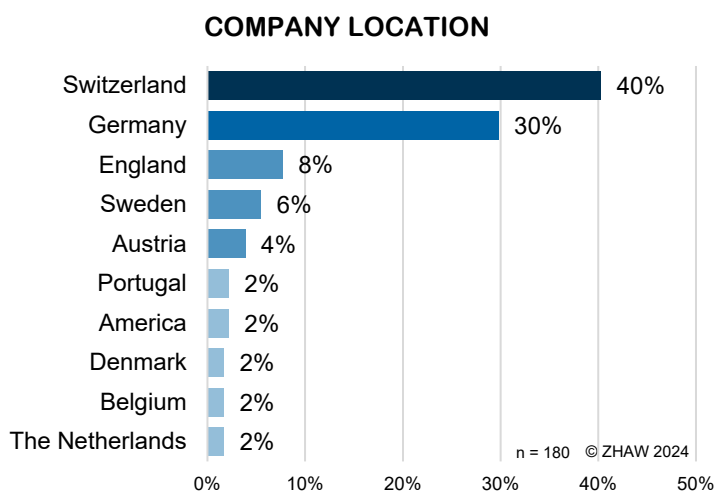
Table 1: Other company locations

#	Other Locations	Count
1	Poland	2
2	Finland	1
3	Indonesia	1
4	Ireland	1
5	Norway	1

1.3   RESPONDENT SECTORS

Half the survey participants are active in the **information technology and services sector** (see Figure 2). Eight percent are in **management consultancy** or the **marketing and advertising sector**.

This is followed by the **financial services sector** (5%), electronic manufacturing (3%), public relations (PR) and communication, higher education, and design (2% each).

Other sectors with one percent each are shown in Figure 2 and a breakdown of other sectors in Table 2.

Figure 2: Sector of the companies surveyed

Table 2: Other sectors

RESPONDENT SECTORS

Sector	%
IT & Services	50%
Management Consulting	9%
Marketing & Advertising	8%
Financial Services	5%
Electronics Manufacturing	3%
PR & Communication	2%
Higher Education	2%
Design	2%
Training & Coaching	1%
Internet	1%
Wholesale	1%
Leisure, Travel, & Tourism	1%
Education Administration	1%

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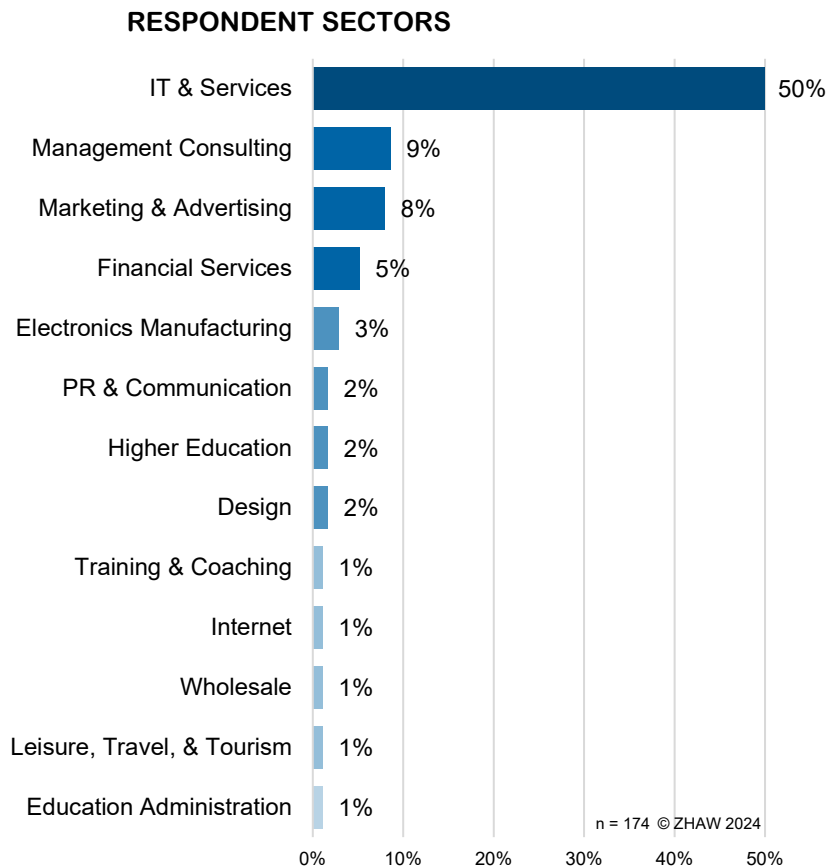
#	Other sectors
1	Medical practice
2	Banking
3	Chemistry
4	Computer Games
5	E-Learning
6	Retail
7	Energy & Environment
8	Research
9	Industrial Automation
10	Consumer Goods
11	Healthcare
12	Luxury Goods and Jewelry
13	Mechanical Engineering
14	Media Production
15	Medical Equipment
16	Fashion & Clothing
17	Online Media
18	Recruitment
19	Pharmaceuticals
20	Publishing
21	Sport
22	Sporting Goods
23	Transportation/Truck/Rail
24	Insurance
25	Utility Companies

Lead management and AI are relevant for all sectors.
The findings of this study come primarily from the information technology and services sector.

2 Lead Management

Marketing and lead automation are used in various areas of lead management. First, the topic of lead research is discussed in more detail in Section 2.1, followed by lead generation (Section 2.2), lead engagement (Section 2.3), and lead scoring (Section 2.4). Figure 3 depicts the action areas in lead management.

Figure 3: Lead management framework

2.1   LEAD RESEARCH

Additional data sources are usually used in business-to-business (B2B) lead management to supplement the contact lists of potential customers. The companies surveyed named an average of **2.4 data sources** to enrich their contact lists.

More than half of the companies use **social networks** (58% in Figure 4), including **LinkedIn** and occasionally XING. As contact details such as telephone numbers, emails, or postal addresses of private individuals and companies on social networks are usually up-to-date, LinkedIn has become one of the **most significant online data sources for lead management**. LinkedIn makes it possible to identify potential customers and automatically address or reach them indirectly or directly via messages.

Conferences and events are also an important source of contact data, according to 52 percent of respondents. Specialist conferences, trade fairs, customer events, or webinars are used to communicate company-relevant content and to get or stay in contact with potential customers. Half the companies also use **customer recommendations** (48%) to obtain contact details of other interested parties, underlining the high relevance of personal and digital **word of mouth** (WoM) in obtaining contact data and new business.

Almost half of the lead data is collected through their own company websites (44%), for example, via contact forms or landing pages. In particular, **lead magnets** such as white papers, e-books, studies, checklists, competitions, tools, product information, and demos serve as an incentive to supply a name and contact details. Only one fifth (21% in Figure 4) enrich their contact lists with information from the **news,** the **commercial register,** or occasionally **job platforms**.

Figure 4: Which data sources do you use to supplement your contact lists? Multiple answers possible.

DATA SOURCES TO SUPPLEMENT CONTACT LISTS

Data Source	Percentage
Social Networks (e.g., LinkedIn)	58%
Conferences and Events	52%
Customer Recommendations (word of mouth)	48%
Company Websites (with data analysts or freelancers)	44%
News, Commercial Register, Job Platforms	21%
Specialized AI Data Providers (e.g., Apollo, Cognism, Zoominfo)	14%

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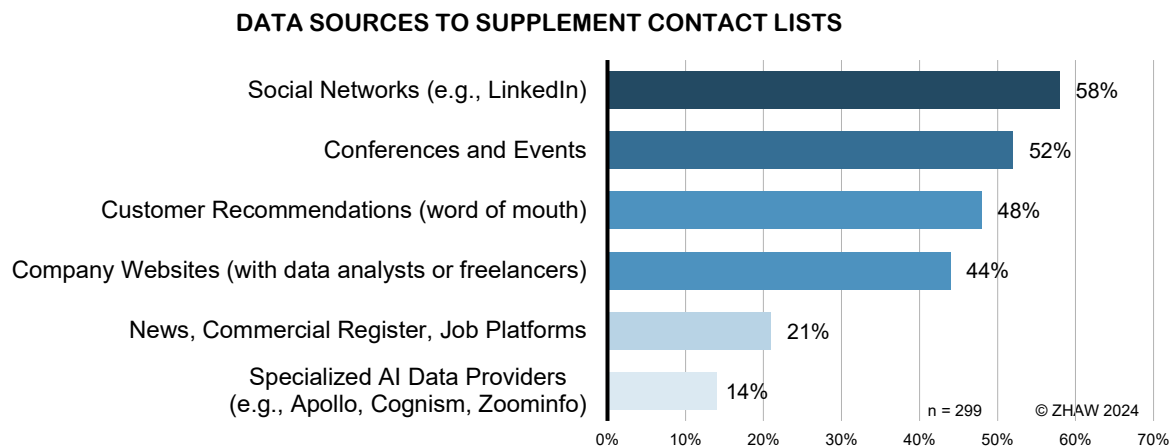
LinkedIn was the most significant contact source in lead research – followed by events, websites, and word-of-mouth recommendations from customers.

At 14 percent, "**specialized AI data providers**" were the least frequently used to supplement existing contact lists. Some practical examples of specialized AI data providers that offer data, tools, and sources of potential leads include:

1. **Apollo.io**: Apollo is an AI-powered data provider that offers a data integration, data management, and lead generation platform that can be used by companies to identify, contact, and engage potential customers.
2. **Cognism**: Cognism is another specialized AI data provider that offers GDPR-compliant solutions and contact data for sales and marketing.
3. **Dataminr**: Dataminr uses AI and machine learning to extract real-time information from public sources such as social media, news websites, and other online platforms. Companies can use these data to identify potential leads who are interested in particular topics or products/services in real time.
4. **HG Insights**: HG Insights offers a technology and company data platform based on AI and machine learning. It collects data from various sources to provide insights into technology and business landscapes.
5. **Dun & Bradstreet**: Since the acquisition of Lattice Engines, Dun & Bradstreet has also offered an AI-supported platform for predictive analytics in B2B sales and marketing.
6. **ZoomInfo**: ZoomInfo offers contact information supported by AI-powered data analysis techniques. It collects and verifies information about companies and decision-makers that companies can use to contact potential leads (ChatGPT 2024).
7. Further AI tools can be found here: www.marketingautomation.report/en/ai-tools#Integrations.

One possible reason why only 14 percent of companies use specialized AI data providers as a data source could be that they are not sufficiently informed about the **possibilities and advantages** of such AI solutions. Others may have **misgivings** about the quality, data protection, or usefulness of the data provided. Compared to other sources, the cost of accessing such data sources must also be considered, which could result in companies using them less frequently. At the same time, there is also the possibility that companies simply prefer the traditional methods or already have **sufficient data available** from other sources, so they do not need additional data from specialized AI data providers.

Figure 5: How do you personalize your emails or contact approaches to ensure relevance?

PERSONALIZATION IN COMMUNICATION

We do not personalize — 9%
We use basic data: First name, last name, company, salutation — 41%
We segment my contacts into lists and customize content based on their interests — 34%
We individualize each approach so that it is tailored to the needs of each recipient — 16%

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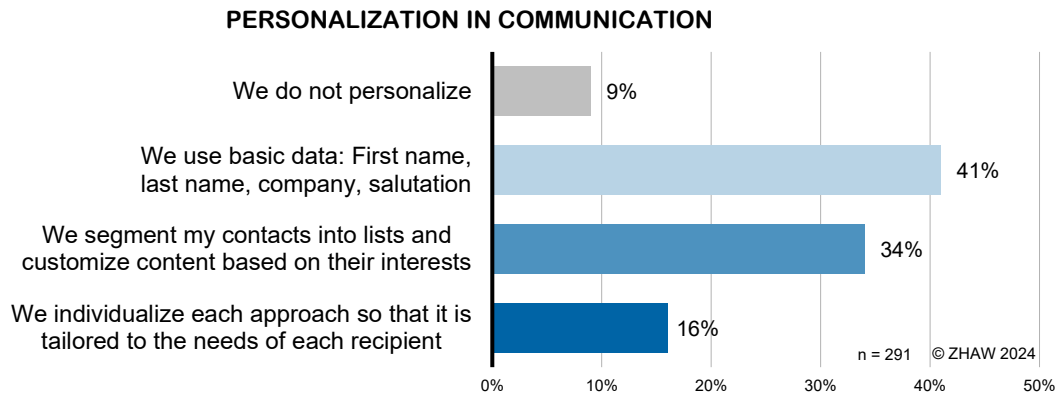
One in three companies personalizes content by segmenting contact lists based on interests.

Especially in the digital world, **personalization** is proving to be an effective tool for promoting customer acquisition and customer loyalty. Personalized communication, especially via email, has been shown to improve the relationship between companies and customers, increase service quality, and foster long-term customer loyalty (Huang & Shyu, 2009).

Figure 5 shows that there is still potential in the area of personalized customer contact. Forty-one percent of the companies surveyed only use **basic data, such as the name and company**, while nine percent do not personalize at all.

Around a third of the companies surveyed carry out **segmentation according to interests** and use this to form clusters to target their customers with relevant content. A further 16 percent target each potential customer or existing customer by **individualizing each approach** in such a way that it is tailored to the needs of each recipient.

Forty-one percent of companies still only personalize their communication with basic data, such as a title, name, and company.

2.2   LEAD GENERATION

Lead generation is about identifying potential customers and collecting content data plus interests in specific products or services. One question in the online survey asked companies about their current **lead generation strategy**, with one-tenth describing themselves as **very successful** (see Figure 6). In these cases, the number of leads and conversions had increased significantly. The majority of respondents describe themselves as **successful** (38%) – achieving good results but still seeing potential for optimization.

Every third company rates itself as "**neither successful nor unsuccessful**," average but with potential – an observation that has seen an 11 percent year-on-year decline. This interesting development indicates that awareness of and reflection on lead generation are increasingly common in corporate practice.

Figure 6: How successful is your company's current lead generation strategy?

SUCCESS IN LEAD GENERATION

No strategy: Development of a clear strategy is planned.
8%

Very successful: Significant increase in leads and conversions.
9%

Uncertain: Difficulties in seeing positive results.
12%

Successful: Good results, but room for optimization.
38%

Neither agree nor disagree: Average results, still plenty of scope for optimization.
33%

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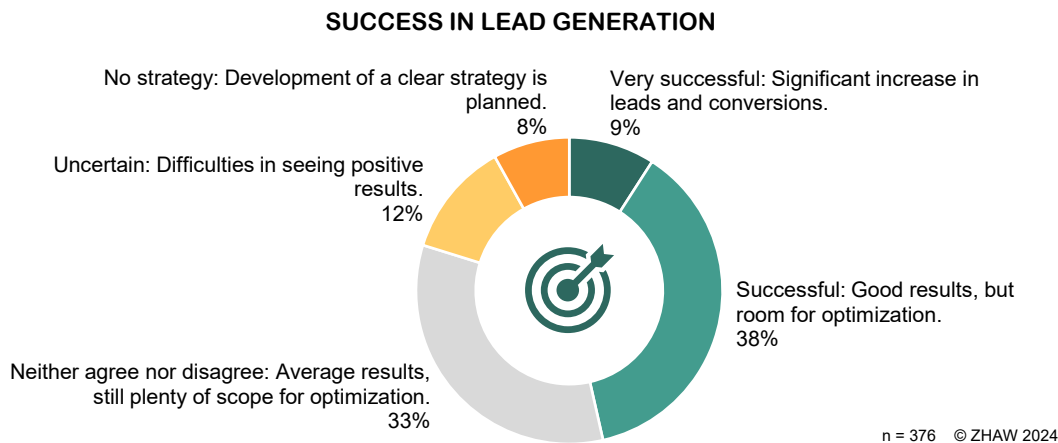
> One in five companies struggles with lead generation, and almost all have room for optimization.

One-fifth of the companies surveyed stated they were unsure about lead generation. Twelve percent in Figure 6 admit **difficulties** in seeing positive results in lead generation. Eight percent of companies **do not have a lead management strategy**.

Compared to the previous year, there was a slight increase of two percent among companies that consider themselves "very successful" and four percent among companies without a clear strategy. The proportion of those who consider themselves "uncertain" also rose by three percent. These findings show that despite some improvements, there are still challenges in the area of lead generation. There is an obvious need for more effective **strategies and measures** to meet the challenges successfully and increase the performance of companies in this area. From the perspective of the companies surveyed, two different tools work best, on average, to generate new leads.

As shown in Figure 7 below, over half of the companies surveyed use their **personal network** for lead generation, followed by **events and trade fairs** at 41 percent. Unlike in the previous year, events and trade fairs surpassed the relevance of organic content with an increase of ten percent. The use of personal networks also increased by six percent compared to 2023. This is known as the **post-COVID effect**, with **personal contacts** – the "personal network" and "events & trade fairs" – once again becoming the most essential tool for lead generation after the COVID-19 pandemic.

Around a third of respondents use organic content via social media posts and blogs for lead generation. For many practitioners, **paid search** (above all Google Ads with 25% of mentions) and **paid social** (especially LinkedIn Ads with 21% of mentions) work best for generating leads. One in five companies surveyed also employed **cold calling**, for example, by email or telephone.

Nine percent of the companies surveyed stated that **AI-based, dynamic email workflows** work best for generating new leads – two percent more than in the previous year. AI has received increasing attention and triggered discussions in recent years, particularly concerning its potential applications and effects on marketing and sales. At the same time, automated, dynamic email workflows have established themselves as tools in marketing strategies, and their scope of application has been steadily expanded over several years. Despite these developments, there still seems to be **great reluctance** or at least a degree of skepticism regarding the effectiveness of AI-based approaches in lead-generation contexts. One possible explanation for this phenomenon may lie in the complexity and multi-layered nature of the lead generation process, which traditionally depends on various factors. These include the industry, business model, pricing and sales strategy, products and services offered, and individual consumer preferences.

Figure 7: What do you think works best for generating leads in your company? Multiple answers possible.

INSTRUMENTS IN LEAD GENERATION

Instrument	Percentage
Personal Network	51%
Events & Trade Fairs	41%
Organic Content (Blog & Social Media Posts)	36%
Paid search (e.g., Google Ads)	25%
Paid social (e.g., LinkedIn Ads)	21%
Cold Calling by Email or Telephone	20%
AI-Based, Dynamic Email Workflows	9%

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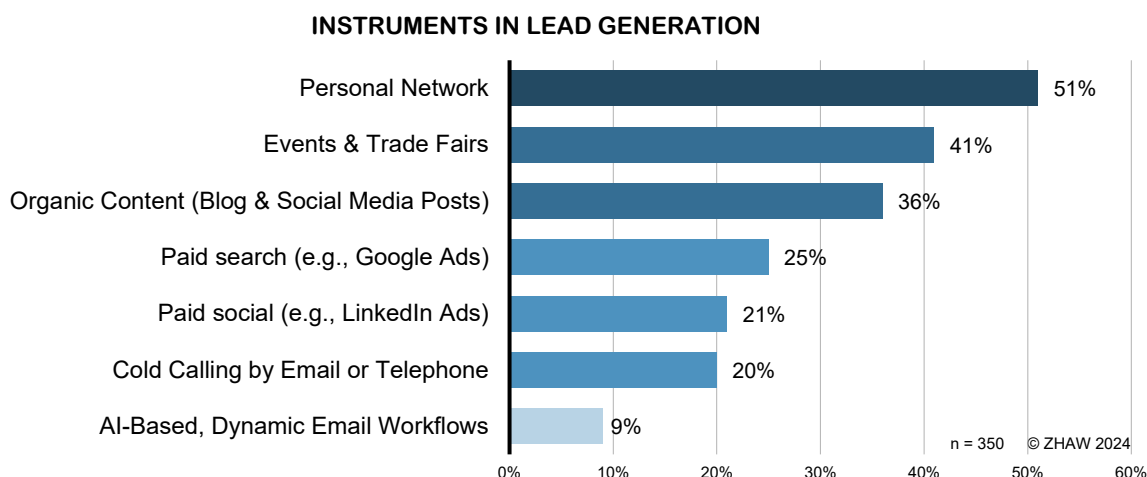
> Personal contacts and events & trade fairs have become much more relevant again following the COVID-19 crisis. In digital advertising, Google Ads & LinkedIn Ads work best for many companies when generating leads.

Integrating AI into customer acquisition processes requires careful adaptation and integration to the specific requirements and dynamics, which may explain a certain skepticism and associated reluctance on the part of companies.

2.3   LEAD ENGAGEMENT

Lead engagement and lead nurturing aim to establish a connection and **exchange with potential customers**. In this context, AI-supported recommendations and strategies lead to continuous and valuable interaction with potential customers. These ongoing conversations strengthen trust between companies and potential customers and increase the likelihood of a purchase being concluded. This approach leads to a recognizable buying interest and is decisive for building long-term customer relationships.

Figure 8 shows that almost half of the companies (41%) engage in **personal exchanges** on-site, by email or telephone, or at special events. As discussed in Section 2.1, personal contact is also the most significant form of support for existing leads.

Thirty-six percent of companies rely, in particular, on **standardized newsletters** for all their contacts. Compared to lead scoring (see Section 2.4), AI is used more in lead engagement – as many as 12 percent of respondents stated that they use **AI-driven email marketing**, in which content is customized. This is still relatively low, but automated and personalized emails with relevant content have been steadily increasing in recent years. Only eight percent of respondents (see Figure 8) claim that they **do not manage leads adequately or at all.**

> More than 75 percent of companies still use traditional methods to manage leads – through personal contacts and standardized newsletters.

Figure 8: How do you manage existing leads in your company?

LEAD MANAGEMENT

Others
3%

Currently insufficient or not at all
8%

AI-driven email marketing (customized content)
12%

Personal exchange (on site, by email, telephone, or at events)
41%

Newsletter (standardized newsletter for all contacts)
36%

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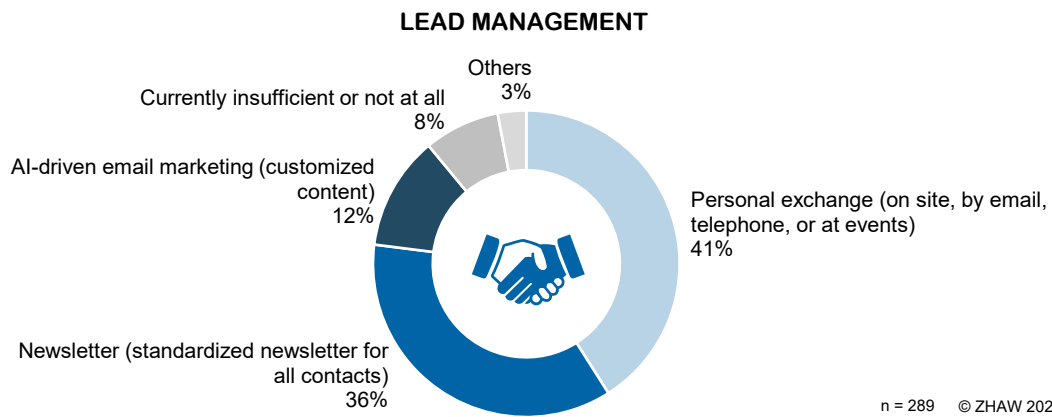
> One in eight companies already uses AI-driven email marketing, where content is customized for the recipient. This proportion is increasing.

The use of **email as a means of communication** is widespread in the corporate world and is considered reliable and authentic. Typically, automated responses are sent to incoming messages, which are often generic and have limited usefulness (Patel et al., 2019).

A company has two basic options for sending **individual follow-up emails** in lead engagement. Either it answers the emails manually, with or without the support of systems, or it uses marketing automation. **Email automation** offers many advantages, as new studies have shown. Both Jagnade (2023) and Khare (2022) highlight the time saved by automating email tasks such as composing, sending, and managing emails.

Figure 9: How do you use automation to send effective follow-up emails?

AUTOMATION OF FOLLOW-UP EMAILS

AI-driven system: Our system automatically evaluates each response and suggests answers based on it.
2%

AI-enabled: Our system automatically categorizes feedback and arranges targeted follow-ups.
7%

Not at all: We always write answers manually.
33%

Personalized system proposals: Based on the segmentation, we send personalized articles and webinars to each recipient.
23%

System templates: We use predefined templates for our answers.
35%

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> One-third of companies answer emails manually, around one-third respond with predefined system templates, and nearly one-quarter with personalized system proposals.

The **degree of automation for follow-up emails** from survey participants can be seen in Figure 9. A third of companies have **not yet automated the mailing process** and compose all responses manually. A similar number of companies (35%) use **predefined templates** for their responses to speed up the process. Just under a quarter state that they send personalized articles and webinars based on **segmentation** to make their mailings more relevant.

Overall, nine percent of respondents **use AI for emails.** Some of them (7% in Figure 9 above) use AI directly or indirectly to categorize feedback automatically and send targeted follow-up emails. Only eight companies (equivalent to 2% in our survey) stated that their implemented **AI system automatically evaluates each response** and suggests answers based on this.

In short, two-thirds of the companies surveyed are still in the **early stages** of automating their emailing, while one-third are taking a progressive approach. This enables companies to personalize their communication and save time.

> AI-driven processes and systems have so far been most successful at a low level in the areas of lead research and lead engagement.

2.4   LEAD SCORING

Before interested parties are actively processed in lead or customer management, the **quality and potential of the leads** must be checked. **Lead scoring** has an important function in this process, as it increases the effectiveness of the campaigns carried out by the sales team. A well-qualified lead helps the sales team to increase the conversion rate (Priya, 2020). Lead scoring benefits considerably from AI applications, as large volumes of data can be analyzed quickly and efficiently, leading to more targeted and effective sales strategies. The use of AI in lead scoring significantly contributes to optimizing sales processes.

Figure 10 shows that 18 percent of the companies surveyed **do not carry out lead qualification,** so they do not differentiate between information seekers and prospective buyers. This means that one in five companies cannot recognize prospective customers who are ready to buy, such as sales-qualified leads (SQLs).

At 56 percent, more than half of the 312 companies carry out their **lead evaluation manually.**

Figure 10: How do you evaluate contacts to distinguish between leads who are ready to buy and those just looking for information?

LEAD EVALUATION

Not available: We do not differentiate. — 18%

Manual: We evaluate leads manually in order to differentiate between buying interest and need for information. — 56%

Basic criteria: We rely on simple criteria such as website visits and contact forms to identify prospective buyers. — 25%

Behavior-based: We use automated tools that filter leads based on their online behavior and separate ready-to-buy leads from informative leads. — 17%

AI-controlled: We rely on an AI system that automatically recognizes the potential of a lead and distinguishes between willingness to buy and need for information. — 2%

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One in eight companies does not evaluate leads, and more than half evaluate their leads manually.

A quarter of companies use basic criteria such as **website visits and contact forms** to identify prospective buyers. Seventeen percent of the respondents in Figure 10 above go one step further and **qualify their leads based on behavior**. This means that these companies use marketing automation tools that filter online behavior and are, therefore, able to separate ready-to-buy leads from leads looking for information.

Only seven respondents (2% in Figure 10) stated that lead qualification is AI-driven. AI in lead qualification has great potential, as this task requires considerable human resources, and it is difficult to identify manually the characteristics of high-quality prospects. AI-based tools can analyze both structured and unstructured data, which is used to **segment customers** and create **prospect lists**.

The capabilities of AI are not limited to written content. Indeed, AI systems can also analyze voice or image data from photos, videos, or conversations. This conserves human resources and creates a comprehensive profile of potential customers (Paschen et al., 2020). Here too, it is reasonable to assume that despite the increasing use of AI technologies and their potential to improve lead qualification, companies are still hesitant to integrate these technologies into their marketing and sales processes.

A similar picture emerged when asked **how ready-to-buy contacts are recognized** (see Figure 11). Fifteen percent stated that they do not recognize ready-to-buy contacts, while nine percent record their leads indirectly through invitations to events, webinars, or workshops.

Almost half of those surveyed said that they **follow up manually**, and 28 percent identify ready-to-buy contacts directly based on **website user behavior**, e.g., downloads or contact forms. Analogous to the development stage of lead evaluation (see Figure 10), in this case too (see Figure 11), only three percent stated that they proactively recognize ready-to-buy contacts **through AI-supported analysis of emails, engagement, and surveys**.

Compared to 2023, there was a slight shift from direct recognition based on user behavior (down by 6%) towards manual follow-up (up by 8%).

Figure 11: How do you identify the contacts in your company who are ready to buy?

IDENTIFICATION OF READY-TO-BUY LEADS

We do not recognize them and this poses a significant problem.
15%

Directly based on user behavior on our website (e.g., page visits, downloads).
28%

By manual follow-up.
45%

Indirectly through invitations to events, webinars, or workshops.
9%

Proactively through AI-supported analysis of emails, engagement, and surveys.
3%

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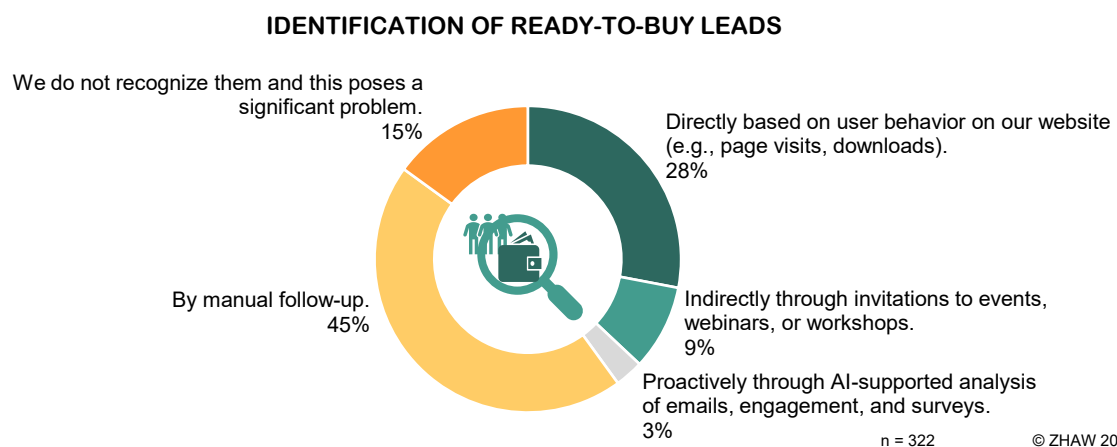
Very few companies use AI-supported systems for lead scoring. The majority still do this manually.

3 AI in Lead Management

This section focuses on the significance of artificial intelligence (AI) in lead management. Section 3.1 defines "artificial intelligence" to create a shared understanding, while Section 3.2 highlights the differences between AI and automation. The advantages and practical uses of AI in marketing and sales are discussed in Section 3.3. Section 3.4 looks at the results of the study on lead automation. This is followed in Section 3.5 by an analysis of the potential of AI in lead management. Finally, obstacles to the introduction of AI in marketing are analyzed.

3.1   DEFINITION OF AI

Artificial intelligence (AI) represents an interdisciplinary field of research that aims to develop intelligent systems and machines capable of solving complex tasks that typically require human intelligence. These tasks include various activities such as problem-solving, learning, natural language processing, and pattern recognition. The central goal of AI is to create algorithms and systems that enable computers to exhibit human-like behavior and act autonomously in different environments. Within the broad spectrum of AI, various approaches focus on different methods of achieving this goal. There is a fundamental distinction between rule-based and learning-based systems. **Rule-based systems** follow predefined instructions to solve specific problems or perform tasks. In contrast, **learning-based systems** are designed to learn from experience and data and adapt themselves to make better decisions or solve complex problems (Jutel et al., 2023).

The integration of AI has enabled new approaches in lead management. In particular, **predictive modeling** has opened up new possibilities for lead-scoring techniques. By using machine learning algorithms, it is possible, among other things, to distinguish between different **types of leads**, such as those who are ready to buy and those who are not. These algorithms use existing customer profiles to analyze patterns, identify successful profiles, and evaluate the leads accordingly (Jadli et al., 2023). A rule-based AI system can also implement **lead scoring** by defining specific characteristics or behaviors. This includes behavior on the company website or interactions on social media that indicate a lead with the intention to buy.

3.2   AI VS. AUTOMATION: WHAT IS THE DIFFERENCE?

The distinction between artificial intelligence and automation is not always clear, since both concepts represent technologies that aim to facilitate, accelerate, and improve human work. Table 3 below compares the differences between AI and automation.

Table 3: Artificial Intelligence vs. Automation (based on Donepudi, 2018)

Artificial Intelligence (AI)	Automation
… is able to make **decisions** based on continuous **learning** from previous experience and the information it receives.	… is a type of preset and autonomously acting technology that performs specific tasks **without human intervention**.
… **supports** specialists in analyzing situations and assisting in drawing particular conclusions.	… is designed to perform **repetitive tasks** according to predefined commands and rules.
… **interacts with people** and learns from previous experiences, compares situations, and then acts accordingly.	… works without direct human interaction and follows only **predefined instructions**.

When elements of artificial intelligence are combined with process automation, the concept of **intelligent process automation** (IPA) is created. An IPA tool is characterized by its performance, as it makes it possible to combine the advantages of automation, such as increased speed, efficiency, time savings, and measurability, with the potential, flexibility, and computing power of AI (Donepudi, 2018).

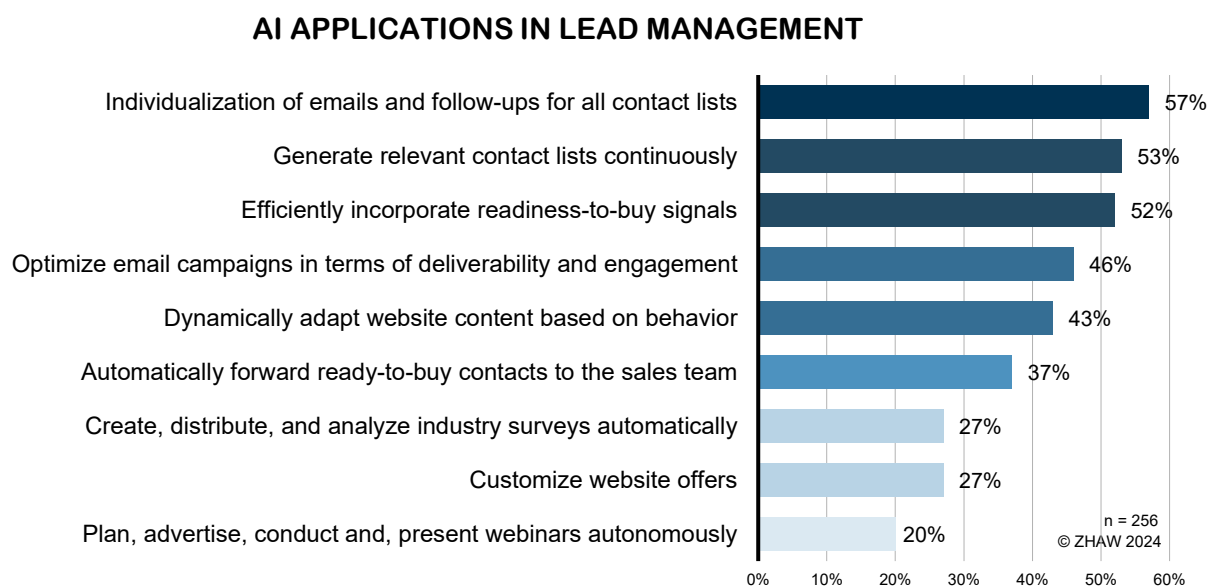## 3.3   VALUABLE AI USE CASES IN LEAD MANAGEMENT

Implementing AI in lead management enables a more precise analysis of customer data, improved predictions of customer behavior, and a tailored adaptation of marketing strategies. These technologies help increase lead generation and qualification efficiency by **processing extensive data volumes effectively.** Companies can increase customer satisfaction and accelerate sales growth by personalizing the customer approach and optimizing marketing campaigns. Overall, AI and automation can improve the accuracy and effectiveness of lead management, which leads to an increased **conversion rate** and optimized **use of resources** (Chintalapati & Pandey, 2022; Kumar et al., 2021; Kaličanin, et al., 2019).

Since **process automation** and the integration of AI tools in lead management have many benefits, study participants were asked which **specific use cases** they consider particularly helpful (see. Figure 12).

The highest level of approval (57%) was given to individualizing **emails and follow-ups** for all contact lists, underlining the prioritization of personalized communication. This is closely followed by the continuous **generation of relevant contact lists** (53%), indicating the importance of efficient data management.

The integration of **purchase-readiness signals** into the lead management process is seen as valuable by 52 percent of respondents, underlining the relevance of AI for identifying sales-ready leads. Slightly under half the respondents (46% in Figure 12) consider optimizing email campaigns in terms of **deliverability and engagement** to be a significant AI use case.

Figure 12: Which AI use cases would be helpful to you? Consider goal achievement and saving time and money.

AI APPLICATIONS IN LEAD MANAGEMENT

Application	Percentage
Individualization of emails and follow-ups for all contact lists	57%
Generate relevant contact lists continuously	53%
Efficiently incorporate readiness-to-buy signals	52%
Optimize email campaigns in terms of deliverability and engagement	46%
Dynamically adapt website content based on behavior	43%
Automatically forward ready-to-buy contacts to the sales team	37%
Create, distribute, and analyze industry surveys automatically	27%
Customize website offers	27%
Plan, advertise, conduct and, present webinars autonomously	20%

n = 256
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The individualization and optimization of email campaigns, generation of contact lists, and recognition of willingness to buy are helpful AI applications.

AI is used to optimize opening and click rates in emails and dynamically adapt websites based on behavior.

The **dynamic adaptation of website content** based on behavior was also frequently mentioned by 43 percent of respondents in Figure 12 above. This confirms the increasing importance of personalized experiences on the website, within an app, in an online store, or a customer portal.

The **automated forwarding of ready-to-buy contacts** from marketing to the sales team is considered valuable by 37 percent of participants.

The automatic creation, distribution, and analysis of **sector surveys** (such as this study) and the **individual design of website offers** (e.g., personalized product recommendations) are considered valuable use cases for AI in lead management by 27 percent of respondents.
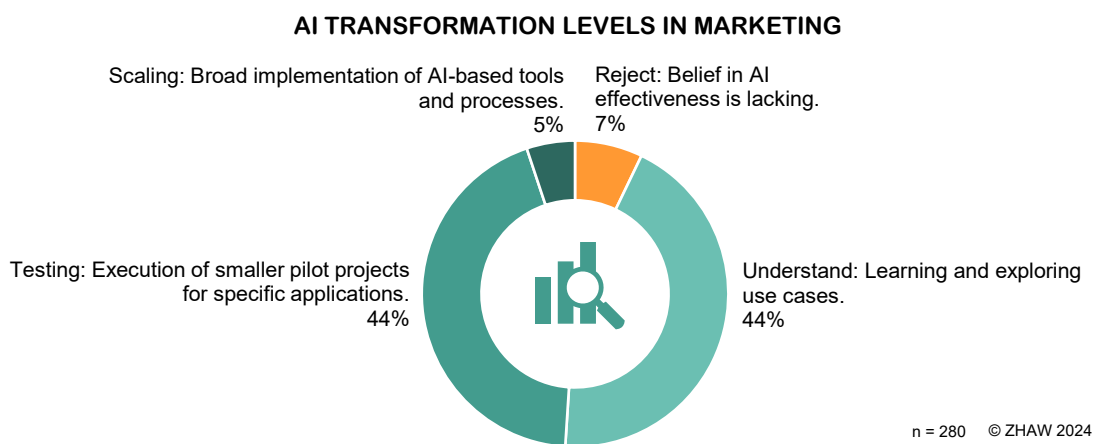
The autonomous planning, advertising, implementation, and reproduction of **webinars** complete the list with 20 percent in Figure 12. Webinars or other events are use cases that can be easily and efficiently automated thanks to AI or marketing automation tools such as Hubspot or Salesforce. Webinars are only of interest in lead management to 20 percent of the companies surveyed.

On average, respondents identified just 3.6 valuable AI use cases in lead management, underpinning the broad spectrum of optimization opportunities.

3.4   LEAD AUTOMATION

Automating the lead management process through AI enables the efficient transformation of prospects into loyal customers. By automating and personalizing the initial contact, follow-up, and segmentation, companies can achieve high efficiency in their processes without compromising on quality. This makes it possible to focus on the **most promising leads** and achieve higher conversion rates. Artificial intelligence, therefore, plays a decisive role in increasing efficiency and effectiveness in lead automation.

Figure 13: Which transformation level in artificial intelligence (AI) is now most applicable to your marketing?

AI TRANSFORMATION LEVELS IN MARKETING

Scaling: Broad implementation of AI-based tools and processes. 5%

Reject: Belief in AI effectiveness is lacking. 7%

Testing: Execution of smaller pilot projects for specific applications. 44%

Understand: Learning and exploring use cases. 44%

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Forty-four percent of companies are still in the learning phase and exploring practical AI uses. Another 44 percent are already in the testing phase and carrying out small AI pilot projects.

Only seven percent remain unconvinced and have no confidence in AI and its effectiveness.

When companies are asked which **transformation level** in AI is currently most relevant to their own marketing operations, 44 percent in Figure 13 said they are at the "**level of understanding**." This means that **most companies are now learning and exploring AI use cases in marketing**. This confirms the results of last year's study and in other literature that many companies are still in the learning and exploration phase concerning AI (see Gartner, 2023; McKinsey Global Survey on AI, 2023).

Surprisingly, 44 percent of companies have already reached the "**testing level**" regarding AI in marketing. They use initial, **specific AI applications** as part of smaller pilot projects, showing that many companies take the topic seriously, try out AI applications, and invest in AI solutions. These study findings confirm the survey conducted by the SRH Berlin University of Applied Sciences, which revealed that 40.6 percent use AI in marketing, 18.8 percent of them extensively (Bünte, 2023).

A small minority of five percent in Figure 13 is already at the "**scaling level**." These companies have already **widely implemented AI-based tools and processes** and can scale AI company-wide. Just seven percent of respondents **reject AI**, revealing only a small minority lacking faith in its effectiveness.

Figure 14 below provides insights into the practical applications and use of AI in lead management. Four out of five respondents **do not synchronize their CRM (customer relationship management) system with AI data providers**. Only 10 percent (tend to) have a regular synchronization between CRM and AI systems, thereby allowing real-time data to be used for informed decisions. The second statement in Figure 14 refers to the use of **AI to collect detailed information about leads**. For 71 percent, the statement, "we use AI to collect detailed information about leads and address them individually," meets with "mostly disagree" or "completely disagree." Only nine percent of respondents fully or somewhat agree they use AI to collect detailed information about potential customers and address them individually.

Figure 14: Uses of AI in lead management

AI IN LEAD MANAGEMENT
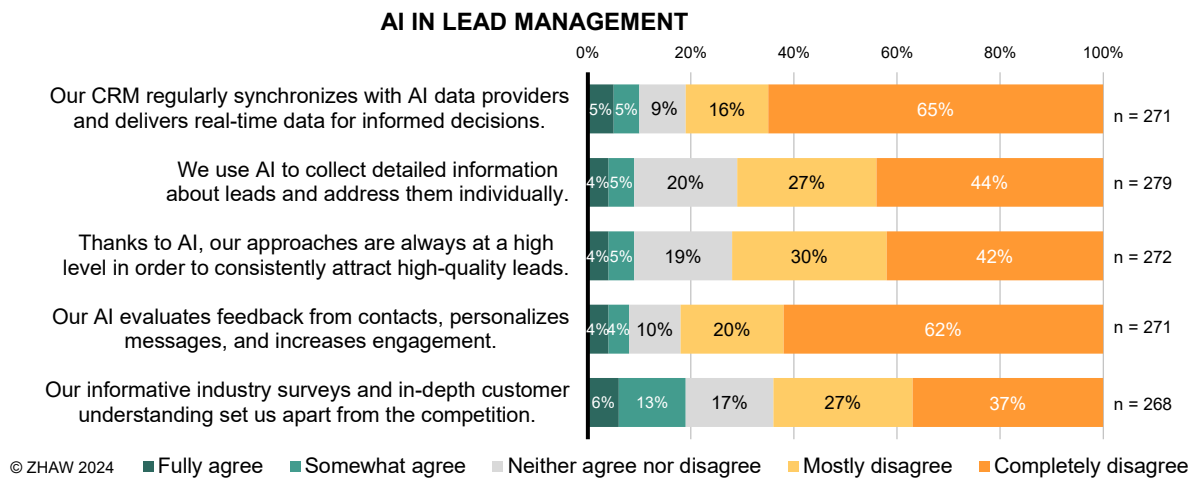
A minority of 10 percent synchronize CRM and AI systems and address leads based on AI. For a few, AI is still not used to evaluate contact data.

The third statement refers to the **high quality of the AI-supported approach to generating leads**, and the data show that 72 percent of respondents (tend to) disagree. In only nine percent of cases, the approaches are always high-quality, thanks to AI.

The fourth statement, "**Our AI evaluates feedback from contacts, personalizes messages, and increases engagement**," does not apply at all (62% in Figure 14) or mostly not (20% in Figure 14) to more than 80% of

respondents. With just four percent each, the companies surveyed somewhat or fully agreed that they use AI tools to personalize their messages.

The final statement in Figure 14 shows that more than half of those with **informative industry surveys and a sound understanding of their customers** cannot (37%) or mostly cannot (27%) set themselves apart from the competition. Around one in eight companies (13%) views these skills as more of a USP (unique selling proposition), while six percent of respondents fully concur with this statement.

Statistical analysis shows that all five statements in Figure 14 exhibit significant correlations. The strong and significant link between the second and third statements is particularly noteworthy. This suggests that companies using AI to obtain detailed information about leads – and therefore able to communicate in a targeted manner – achieve a high level of communication and generate high-quality leads. It also shows that the use of AI to analyze feedback and personalized messages based on it, coupled with increased engagement (Statement 4), is significantly related to a sophisticated approach and the acquisition of high-quality leads. This again underlines the importance of **AI tools for high-quality communication and the acquisition of valuable leads**.

As mentioned above, all five statements have a significant correlation, indicating that companies do not selectively choose individual aspects (e.g., lead generation or lead research) when using AI tools in lead management. Instead, the findings suggest that a **comprehensive integration of AI technologies** is practiced across the lead management process. This underlines the importance of a holistic application of AI tools in lead management to optimize efficiency and effectiveness in lead generation and processing.

Despite the numerous advantages offered by the use of artificial intelligence in lead management, it is evident that only a minority of 10 percent currently use such technologies. This discrepancy reveals **considerable potential** for the broader application of AI tools in this area. Companies that decide to invest in AI solutions are now positioning themselves for a significant competitive advantage. The early adoption of AI in lead management can increase the efficiency and effectiveness of processes and lead to a sustainable improvement in customer acquisition and retention.

> Using AI in lead management significantly improves the quality of communication and acquisition of high-quality leads.

3.5   POTENTIAL IN LEAD MANAGEMENT

As shown in Figure 15 below, the companies surveyed see potential for increasing efficiency in all four areas of lead management and lead automation. The most significant potential is in **lead generation** (61%). More than half of the companies surveyed (52%) see the potential of **lead automation** to control and evaluate their lead processes comprehensively.

There appears to be slightly less potential in the areas of **lead engagement** (45%), **lead scoring** (44%), and **lead research** (44%). On average, participants indicated 2.4 areas in lead management with the potential for increasing efficiency.

Figure 15: Which areas have the most significant potential to be used more efficiently in your company? Multiple answers possible.

POTENTIAL FOR EFFICIENCY GROWTH

Area	Percentage
Lead Generation: Address potential customers initially with relevant content.	61%
Lead Automation: Control and evaluate lead processes comprehensively and automatically.	52%
Lead Engagement: Build and maintain relationships with interested parties.	45%
Lead Scoring: Check interested parties for suitability and willingness to buy.	44%
Lead Research: Validate and enrich contact data for qualitative, relevant communication.	44%

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AI-based customer contact has the most significant potential, followed by lead automation and lead engagement.

Surprisingly, **lead generation** has the most significant potential according to the respondents, although over a third claim to be successful (38%) or very successful (9%) in lead management (see Figure 6 in Section 2.2).

Although a good half of the respondents see the potential for increasing efficiency in lead automation, only around ten percent actually benefit from the advantages AI offers in lead management (see Section 3.4). This shows that many companies are **still unaware of the wide range of possibilities** that AI and automation can offer.

Analysis of the other three areas of lead management, as set out in Sections 2.1, 2.3, and 2.4, also reveals that the majority do not yet use AI. This leads to the conclusion that although successes have already been achieved in some areas, the combination of automation and AI, in particular, harbors considerable untapped potential.

The synthesis of these findings suggests that integrating AI and automation technologies into lead management not only represents an **untapped potential** for efficiency gains but could also offer a decisive **competitive advantage** for those companies that take these steps now. In a constantly changing business world, this could be the key to standing out from the competition in the long term and significantly improving the quality and effectiveness of lead generation and processing.

Many companies still seem unaware of the considerable potential of automation and AI in lead management.
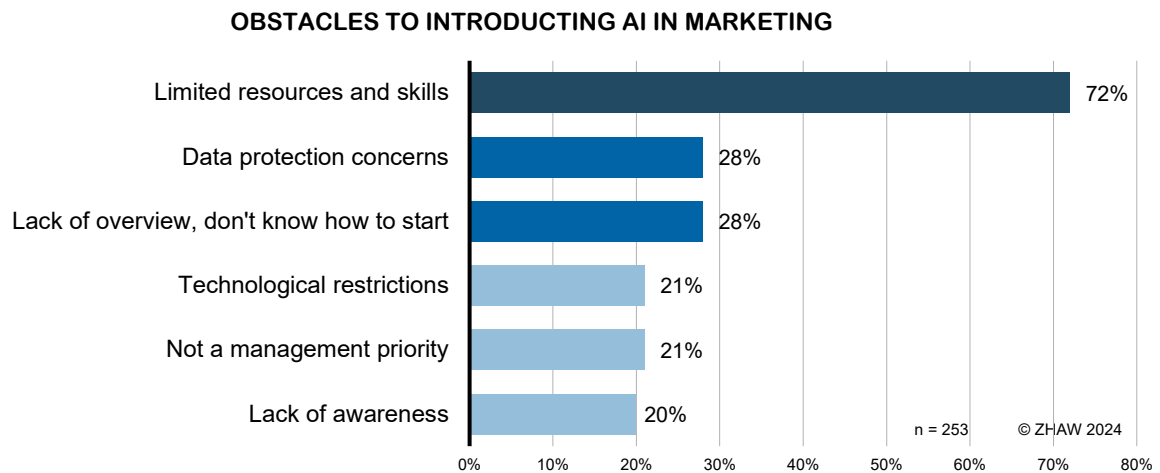
3.6   BARRIERS TO INTRODUCING AI IN MARKETING

The fact that AI tools are not yet used in marketing is due to the **limited resources and skills** of nearly three-quarters of respondents. As shown in Figure 16 below, 72 percent of respondents stated this as their most significant obstacle to introducing AI in marketing.

At the same time, 28 percent perceive **data protection concerns** as their biggest obstacle, and another 28 percent cited a lack of overview or difficulties getting started with AI.

Twenty-one percent of respondents identified **technological restrictions** and another 21 percent **lack of priority by management** as a hurdle. One in five respondents also thought that a **lack of AI awareness** in marketing is holding them back.

Figure 16: What are the biggest obstacles to introducing AI marketing at your company?

OBSTACLES TO INTRODUCING AI IN MARKETING

Obstacle	Percentage
Limited resources and skills	72%
Data protection concerns	28%
Lack of overview, don't know how to start	28%
Technological restrictions	21%
Not a management priority	21%
Lack of awareness	20%

n = 253   © ZHAW 2024

Limited resources and skills hinder the introduction of AI in marketing at seven out of ten companies.

4 Lead Automation Maturity Index

This section presents the Lead Automation Maturity Index (LAMI) model, which consists of the following five dimensions: lead research, lead generation, lead engagement, lead scoring, and lead automation. An average LAMI of 36 (out of a possible 100) index points was calculated for the 248 companies surveyed. Lead automation (with Ø 44 index points) and lead research (with Ø 39 index points) were the most developed among the companies, while lead generation appears to have the most significant potential.
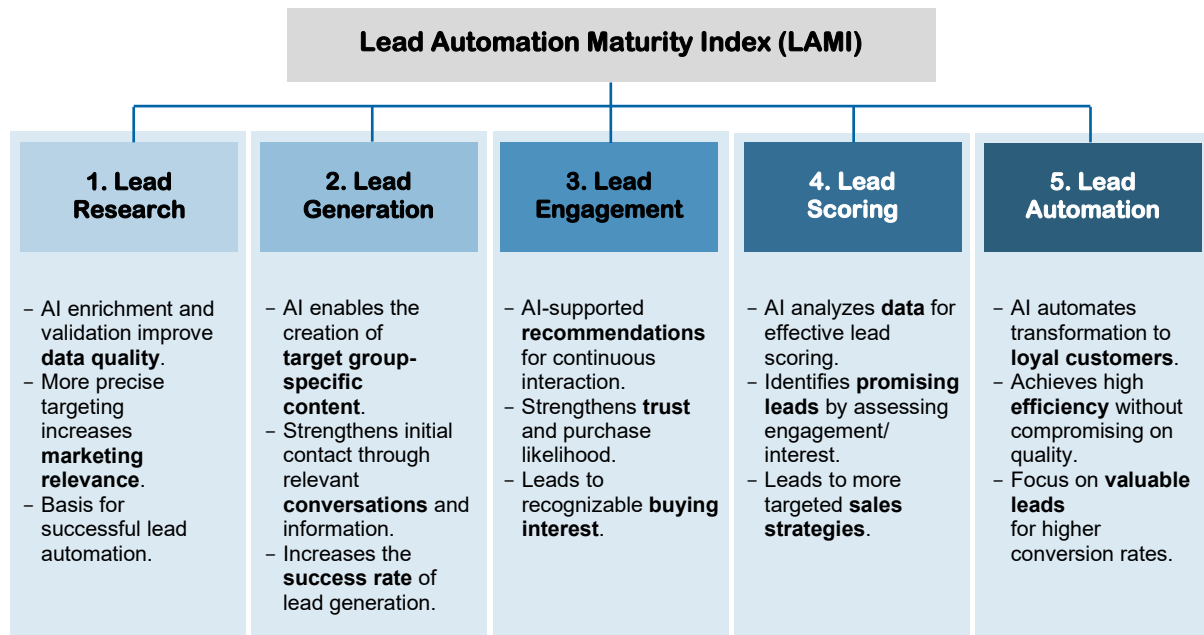
4.1   DERIVING THE LAMI MODEL

The **Lead Automation Maturity Index** (LAMI) is an adaptation of the Marketing Automation Maturity Index (MAMI) from the most recent Marketing Automation Report in 2023 (see Zumstein et al., 2023).

Its derivation results from a comprehensive analysis and synthesis of existing lead generation and processing practices. The LAMI model aims to provide companies with a structured framework to evaluate the **maturity of their automation processes in lead generation**, to benchmark with partners and competitors, and to constantly analyze and improve their level of maturity in automated lead generation.

The **five dimensions of the LAMI model** are explained below.

1. **Lead Research:** This dimension focuses on the systematic research and identification of potential leads. Derivation is based on the realization that a sound knowledge of the target markets and target groups is a fundamental prerequisite for effective lead generation. It includes data collection and analysis methods to gain insights into customer needs and behavior. The data from Figure 4 (data sources) and Figure 5 (personalization in communication) in Section 2.1 were used to calculate the index values for lead research.

2. **Lead Generation:** This dimension examines the strategies and tactics to acquire new leads. Data from Figure 6 (success in lead generation) and Figure 7 (lead generation tools) in Section 2.2 were used to calculate the index values for lead generation.

3. **Lead Engagement:** Involvement and interaction with leads are central to this dimension. Derivation emphasizes the importance of personalized communication strategies to build trust and establish relationships with potential customers. This includes email marketing, automated follow-up campaigns, and interactive content. Data from Figure 8 (lead support) and Figure 9 (automation of follow-up emails) in Section 2.3 were used to calculate the index values for lead engagement.

4. **Lead Scoring:** This dimension evaluates a lead's readiness to buy. It is derived from the need to maximize the efficiency of sales efforts by prioritizing those leads most likely to convert. This requires advanced analytics and AI-supported algorithms to evaluate and categorize leads. Data from Figure 10 (lead scoring) and Figure 11 (identification of ready-to-buy leads) in Section 2.4 were used to calculate these index values.

5. **Lead Automation:** The focus here is on the automation of lead management processes. Derivation of this dimension reflects the increasing importance of efficiency and scalability in marketing and sales processes. Key aspects include integrating CRM systems, marketing automation platforms, and AI tools to optimize lead processing. Data from Figure 13 (AI transformation level in marketing) and Figure 14 (AI use in lead management) in Section 3.4 were used to calculate the index values for lead automation.

Figure 17: The five dimensions of the Lead Automation Maturity Index (LAMI)

Lead Automation Maturity Index (LAMI)

1. Lead Research	2. Lead Generation	3. Lead Engagement	4. Lead Scoring	5. Lead Automation
– AI enrichment and validation improve **data quality**. – More precise targeting increases **marketing relevance**. – Basis for successful lead automation.	– AI enables the creation of **target group-specific content**. – Strengthens initial contact through relevant **conversations** and information. – Increases the **success rate** of lead generation.	– AI-supported **recommendations** for continuous interaction. – Strengthens **trust** and purchase likelihood. – Leads to recognizable **buying interest**.	– AI analyzes **data** for effective lead scoring. – Identifies **promising leads** by assessing engagement/interest. – Leads to more targeted **sales strategies**.	– AI automates transformation to **loyal customers**. – Achieves high **efficiency** without compromising on quality. – Focus on **valuable leads** for higher conversion rates.

In summary, the LAMI model provides a holistic framework that enables companies to critically evaluate their current lead generation and lead management processes and make targeted improvements. Derivation of each aspect is based on current **best practices and innovative approaches** in digital marketing to help companies increase their competitiveness and effectiveness in lead generation. LAMI and its five dimensions are based on these foundations (see Figure 17).

4.2   DISTRIBUTION OF LEAD AUTOMATION MATURITY SCORE

An analysis of LAMI results shows the following distribution on a scale of 0 to 100 index points (see Figure 18).

Every tenth company we surveyed had a very low, strongly **below-average index** (score/points) between 11 and 20. Precisely 29 percent had a below-average score of between 21 and 30. As the **LAMI average was 36 points**, 30 percent of companies fell into the average category of between 31 and 40 points.

Every fifth respondent achieved a **slightly above-average LAMI** score of 41 to 50 points. Every tenth company had a **strong above-average LAMI score** of over 41 points and can be classified as very successful in lead generation.

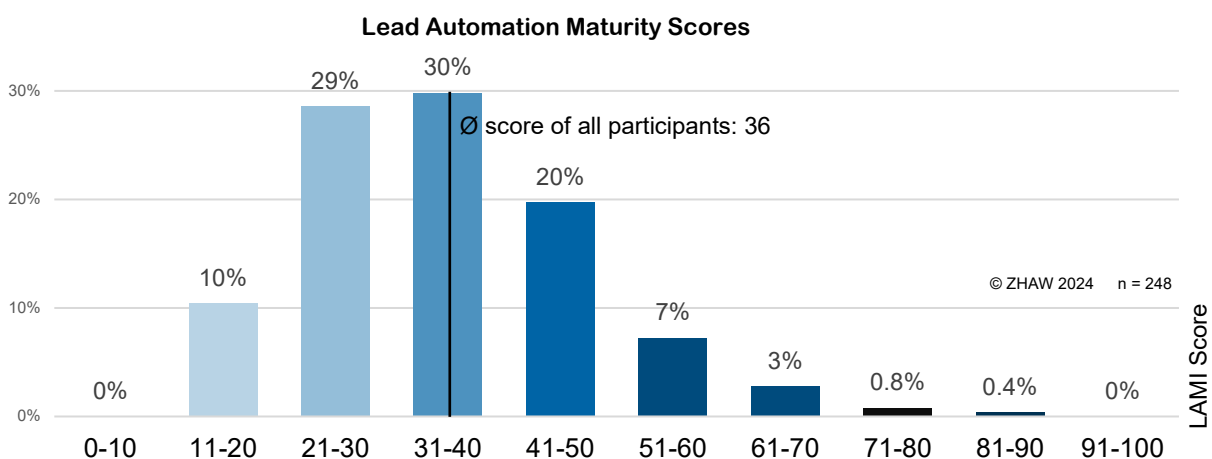Figure 18: Distribution of the index points achieved in LAMI

Lead Automation Maturity Scores

Ø score of all participants: 36

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0-10	11-20	21-30	31-40	41-50	51-60	61-70	71-80	81-90	91-100
0%	10%	29%	30%	20%	7%	3%	0.8%	0.4%	0%

LAMI Score

Figure 19: Spider diagram showing the average scores of the five LAMI dimensions
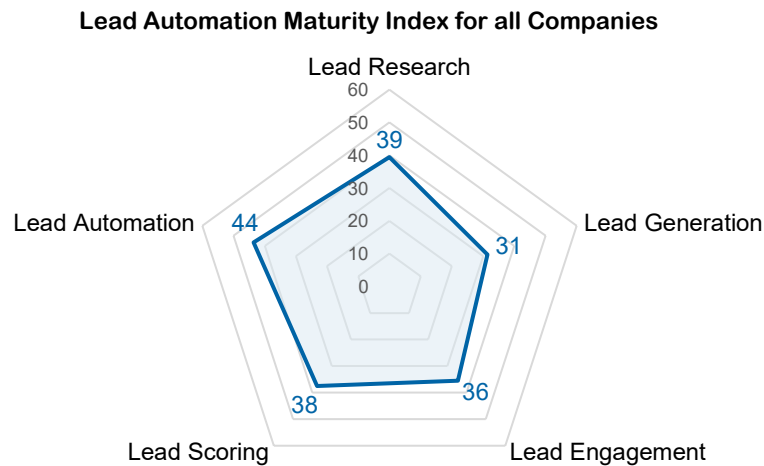
Lead Automation Maturity Index for all Companies

Table 4: Average score of the five LAMI dimensions

1. Lead Research	2. Lead Generation	3. Lead Engagement	4. Lead Scoring	5. Lead Automation
39.4	31.4	35.5	37.5	43.6
Average overall score 35.8 (n = 248)				

> The average overall score for the Lead Automation Maturity Index (LAMI) was 36 points. Scores were highest for lead research and lead automation.

If we analyze the individual dimensions of LAMI, the average score for **lead research** was 39.4 (see Figure 19 and Table 4 above). The average score for **lead generation** was significantly lower at 31.4 and slightly lower for **lead engagement** at 35.5. In l**ead scoring**, the 248 companies achieved an average score of 37.5. Interestingly, the score for lead automation was highest at 43.6.

It stands to reason that the LAMI score will differ depending on the sector. "**Information Technology & Services**" had an average score of 38.2; in this sector, lead research resulted in an average (rounded) score of 43 (see Figure 20 and Table 5). The average number of points for lead generation was 33, and for lead engagement 38. Regarding lead scoring, the 72 technology and service companies we surveyed achieved an average score of 44, which is higher than the total, and the score for lead automation is also 44.

"**Consulting**" had an average score of 38.3, and this sector had an average (rounded) lead research score of 42 (see Figure 20 and Table 5). As with information technology, the average score for lead generation was 33, and for lead engagement 41 (i.e., above the overall average). The 15 consulting companies achieved an average score of 39 for lead scoring and 49 for lead automation, meaning they seem to automate more than average.

> The level of maturity in lead generation and its five dimensions differ depending on the sector.

Figure 20: Spider diagram showing the average scores for "IT & Services" and "Consulting."
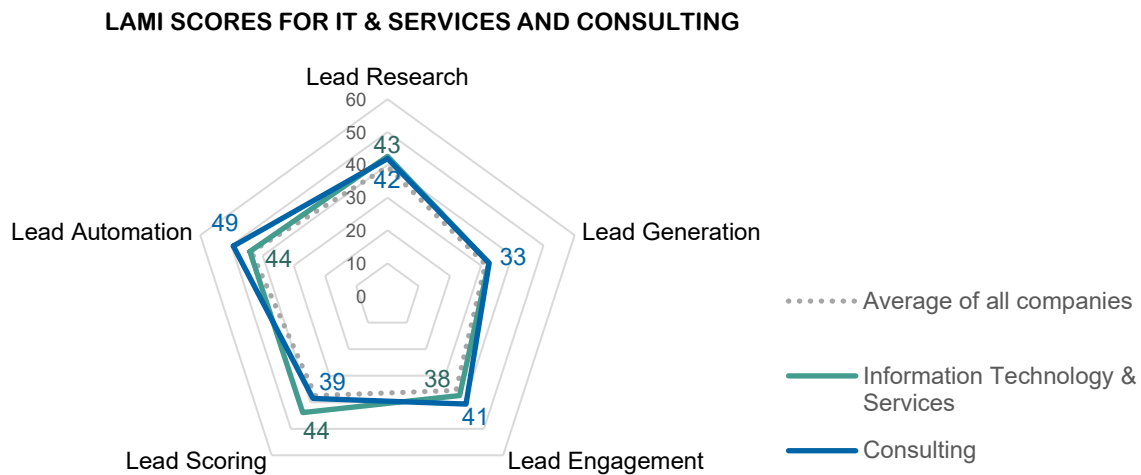

LAMI SCORES FOR IT & SERVICES AND CONSULTING

Table 5: Average LAMI scores in the five dimensions for "IT & Services" and "Consulting."

1. Lead Research Score	2. Lead Generation Score	3. Lead Engagement Score	4. Lead Scoring Score	5. Lead Automation Score
Information Technology & Services				
42.6	32.5	37.5	43.9	44.1
Average overall score 38.2 (n = 72)				
Consulting				
41.9	32.6	40.7	38.6	49.4
Average overall score 38.3 (n = 15)				

Information Technology & Services companies have an above-average LAMI, especially in lead scoring. Consulting companies tend to be strong in lead engagement and lead automation.

4.3   MATURITY LEVEL EXAMPLES FOR INDIVIDUAL PARTICIPANTS

As seen in Section 3.4, almost half of the companies are still in the **learning phase** regarding automation and AI. The following companies currently exploring AI applications were chosen as examples:

1. **Kärcher**: The Swiss division of Kärcher has a below-average index of 26.
2. **IMT AG**: This Swiss engineering company in the medical technology sector has an average LAMI of 38.
3. **HOGALOG AG**: Operator of HOGASHOP, this leading e-commerce platform in the food retail sector has a LAMI score of 50.
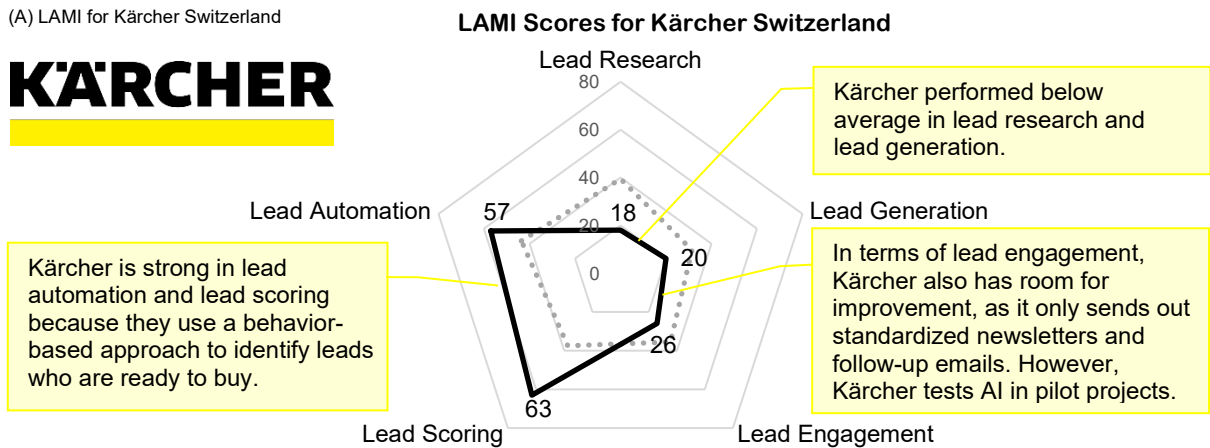
Many companies are already in the **AI test phase** and are carrying out their first AI pilot projects. These include:

4. **Webrepublic**: This leading Swiss digital marketing agency has a maturity level of 46.
5. **Objectbay**: This Austrian IT service provider develops agile enterprise software and has an above-average LAMI score of 65.
6. **Datalogue** is a solution provider for data-driven multichannel measures in marketing and sales. This company managed a very high overall LAMI score of 74 points.
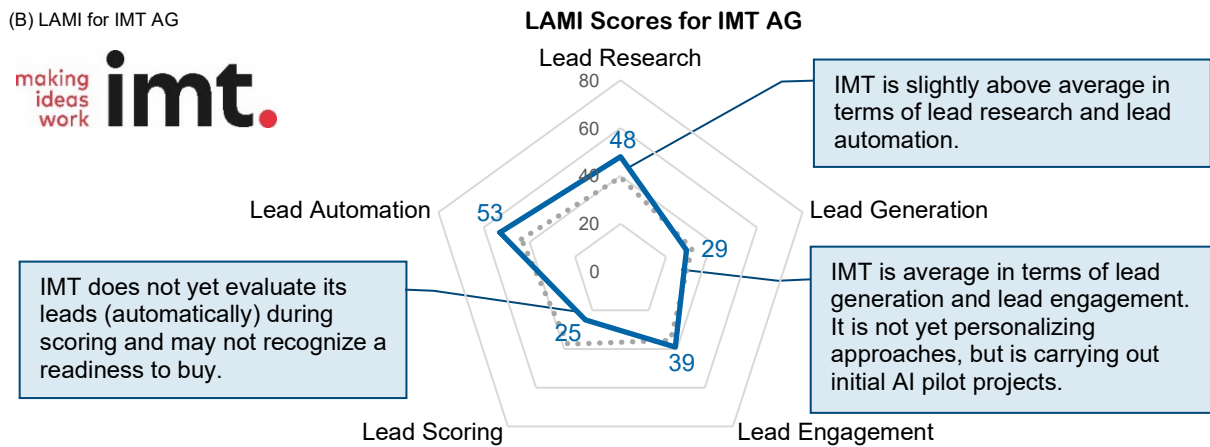
The **spider profiles** with the five LAMI dimensions for the six companies above are illustrated and commented on in Figures 21 and 22 below.

Figure 21: Spider diagrams of selected study participants with average maturity levels
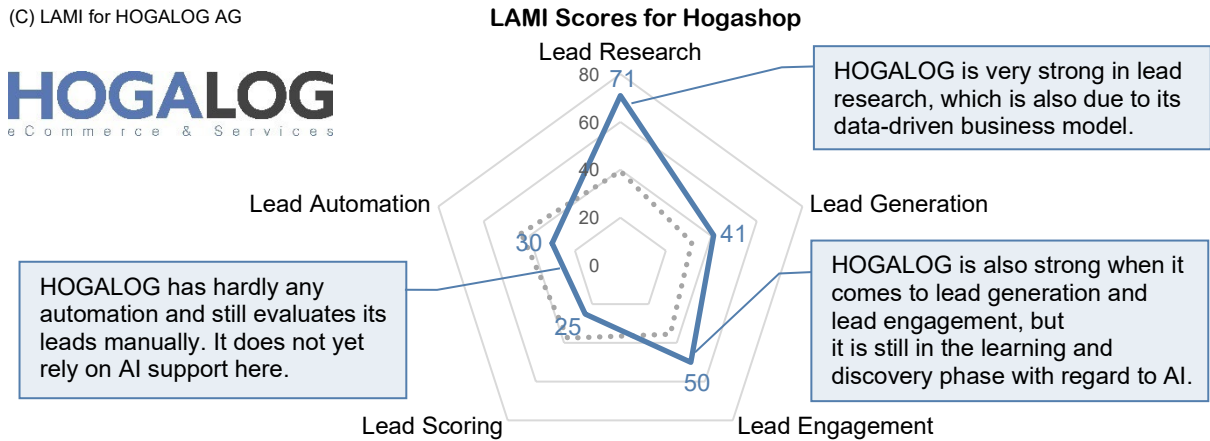
(A) LAMI for Kärcher Switzerland

KÄRCHER

LAMI Scores for Kärcher Switzerland

Kärcher performed below average in lead research and lead generation.

Kärcher is strong in lead automation and lead scoring because they use a behavior-based approach to identify leads who are ready to buy.

In terms of lead engagement, Kärcher also has room for improvement, as it only sends out standardized newsletters and follow-up emails. However, Kärcher tests AI in pilot projects.

Lead Research: 18
Lead Automation: 57
Lead Generation: 20
Lead Scoring: 63
Lead Engagement: 26

(B) LAMI for IMT AG

making ideas work **imt.**

LAMI Scores for IMT AG

IMT is slightly above average in terms of lead research and lead automation.

IMT does not yet evaluate its leads (automatically) during scoring and may not recognize a readiness to buy.

IMT is average in terms of lead generation and lead engagement. It is not yet personalizing approaches, but is carrying out initial AI pilot projects.

Lead Research: 48
Lead Automation: 53
Lead Generation: 29
Lead Scoring: 25
Lead Engagement: 39

(C) LAMI for HOGALOG AG

HOGALOG
eCommerce & Services

LAMI Scores for Hogashop

HOGALOG is very strong in lead research, which is also due to its data-driven business model.

HOGALOG has hardly any automation and still evaluates its leads manually. It does not yet rely on AI support here.

HOGALOG is also strong when it comes to lead generation and lead engagement, but it is still in the learning and discovery phase with regard to AI.

Lead Research: 71
Lead Automation: 30
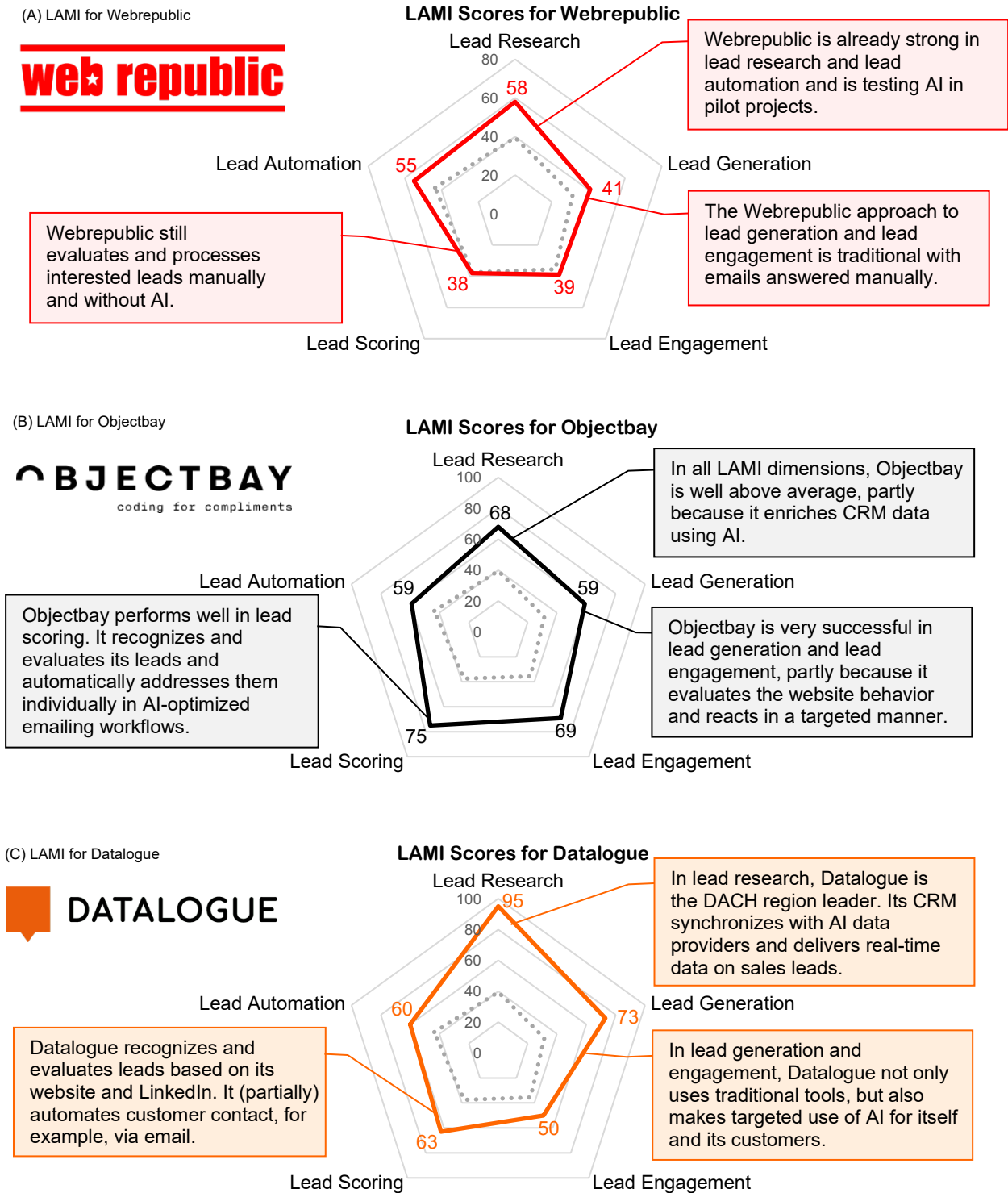Lead Generation: 41
Lead Scoring: 25
Lead Engagement: 50

Why did HOGALOG score well in the Lead Research, Generation & Engagement dimension?

HOGALOG AG has just redesigned its website to attract the interest of different target groups with relevant landing pages. A registration using the **registration form** automatically generates a customer account and a **lead in the CRM system** (Salesforce). Users of a new customer account are guided through the most important functions in an onboarding process.

Every company has different optimization potential in lead management. This is reflected in each LAMI spider profile.

Figure 22: Spider diagrams of selected study participants with high maturity levels (best practices)

(A) LAMI for Webrepublic

LAMI Scores for Webrepublic

Webrepublic is already strong in lead research and lead automation and is testing AI in pilot projects.

Webrepublic still evaluates and processes interested leads manually and without AI.

The Webrepublic approach to lead generation and lead engagement is traditional with emails answered manually.

Lead Research: 58
Lead Generation: 41
Lead Engagement: 39
Lead Scoring: 38
Lead Automation: 55

(B) LAMI for Objectbay

LAMI Scores for Objectbay

In all LAMI dimensions, Objectbay is well above average, partly because it enriches CRM data using AI.

Objectbay performs well in lead scoring. It recognizes and evaluates its leads and automatically addresses them individually in AI-optimized emailing workflows.

Objectbay is very successful in lead generation and lead engagement, partly because it evaluates the website behavior and reacts in a targeted manner.

Lead Research: 68
Lead Generation: 59
Lead Engagement: 69
Lead Scoring: 75
Lead Automation: 59

(C) LAMI for Datalogue

LAMI Scores for Datalogue

In lead research, Datalogue is the DACH region leader. Its CRM synchronizes with AI data providers and delivers real-time data on sales leads.

Datalogue recognizes and evaluates leads based on its website and LinkedIn. It (partially) automates customer contact, for example, via email.

In lead generation and engagement, Datalogue not only uses traditional tools, but also makes targeted use of AI for itself and its customers.

Lead Research: 95
Lead Generation: 73
Lead Engagement: 50
Lead Scoring: 63
Lead Automation: 60

How has Datalogue achieved such a high level of maturity?

With 74 points, Datalogue had one of the highest levels of maturity and automation in this study. Thanks to many years of experience in data and lead management and its focus on automation, optimization through AI was a natural next step for Datalogue.

Established processes and the following uses formed the foundation for this:

1. **Identification of relevant leads and accounts through various online and offline sources.**
   Examples: Event attendance, website visits, job changes.

2. **Data enrichment at lead and account levels.** Examples: Firmographics; use of tech stack; first, second, and third-degree contact network on LinkedIn; social media posts; open positions.

3. **Ongoing scoring of leads across all data points and individual behavior.** Examples: Website visits, newsletter engagement, and stock comparison via statistical twins.

4. **Identification of address and need triggers**. Examples: Posts, event attendance, scraping of websites, job changes by decision-makers, industry developments.

5. **Targeted leads nurturing routes and measures across different channels.** Examples: Email, social media, physical mailings, telephone contacts.

Automation and AI were used to continuously link, integrate, automate, and optimize these processes and the individual use cases. For example, the **quality of the results of text analyses** was increased by more than 20 percent compared to the rule-based approach using AI. At the same time, sales employees were relieved of administrative and **repetitive tasks** to focus on direct customer conversations.

The close internal interaction between the IT, analytics and marketing departments and a solution-agnostic approach had an accelerating effect: AI tools used were evaluated and implemented based on the corresponding uses, not vice versa.

5 Use Cases of Lead Automation

As part of the survey, participants were asked which AI use cases they considered the most valuable in lead management, with an average of 3.6 different use cases being named (see Section 3.3). In this section, nine use cases are described in detail, in descending order of benefit, from the perspective of the companies surveyed. In addition, recommendations for action are derived directly for each use case.

5.1   INDIVIDUALIZATION OF EMAILS AND FOLLOW-UPS FOR ALL CONTACTS

AI enables a high degree of **personalization of emails and follow-up messages** by independently analyzing and evaluating recipients' data and behavioral patterns. This technology can be automated to generate a large amount of content based on individual challenges and considering each contact's interaction history. The use of AI increases the **relevance of communication**, leading to a higher open and click rate and ultimately improving conversion rates.

Recommendation for action: Companies should invest in AI-powered email marketing tools such as ActiveCampaigns[1] and/or outbound investigation tools such as SmartLead[2], Luna[3], Woodpecker[4], Apollo AI[5] or Humanlinker[6] that enable sequences based on behavior and signals. These tools should also offer the option of individualizing emails completely or with placeholders using AI. Maintaining a comprehensive database with detailed information about each contact is crucial to maximize the effectiveness of personalization. A/B tests should also be carried out to measure the effectiveness of different personalized approaches and adapt the strategy accordingly.

5.2   GENERATING RELEVANT LEADS AND CONTACTS

AI can help generate **relevant contact lists** continuously by identifying and evaluating potential leads from various sources. By analyzing online behavior, social media engagement, and other digital footprints, AI can identify potential customers with a **strong interest** in a company's products or services. This technology makes it possible to obtain a wealth of precise and detailed information about potential customers quickly and cost-effectively. These enriched data provide the basis for personalizing marketing campaigns such as email campaigns, thereby increasing engagement.

Recommendation for action: Companies should consider using AI tools such as Clay[7], Apollo AI[5] or BetterContact[8] that specialize in searching, finding, analyzing, and evaluating data to create more effective and targeted contact lists. To take full advantage of these technologies, it is crucial to invest in systems that enable one-time data collection and support the continuous updating and enrichment of contact information. This requires integration with existing CRM systems and other databases to ensure a holistic view of each customer.

5.3   INCORPORATING READINESS-TO-BUY SIGNALS

Using AI, companies can recognize and respond to **purchase readiness signals in real-time.** AI systems analyze behavioral data to identify patterns that indicate a high level of buying interest, such as repeated **visits to product pages**, interaction with particular content, or responses in an industry study. These solutions make it possible to initiate immediate and relevant actions to address leads at the right point in the buying process.

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[1] https://wwww.activecampaign.com
[2] https://www.smartlead.ai
[3] https://luna.ai
[4] https://woodpecker.co
[5] https://www.apollo.io
[6] https://www.humanlinker.com
[7] https://www.clay.com
[8] https://bettercontact.rocks

Recommendation for action: Companies should invest in technologies such as Humanlinker[6], Clay[7], Cotide[9] or Ocean[10] that can precisely identify signals of readiness to buy and determine the optimal moment to approach potential customers. It is crucial to develop automation rules that respond to recognized signals with adapted marketing campaigns or personalized offers to achieve this. The effectiveness of this approach depends on the continuous monitoring and adjustment of these rules and – based on performance data – continuous improvement in accuracy in recognizing purchase intent is needed to ensure the approach is perfectly timed.

5.4   OPTIMIZING THE DELIVERABILITY AND ENGAGEMENT OF EMAIL CAMPAIGNS

AI can improve the deliverability and **engagement of email campaigns** by helping determine the best sending times, optimizing subject lines, and tailoring content to the recipient's situation. Advanced algorithms analyze historical data to identify patterns that lead to higher open rates and adjust campaigns accordingly to boost user interaction.

Recommendation for action: Companies should use A/B testing and AI-powered analytics to refine the elements of their email campaigns continuously. This includes testing different subject lines, content, and sending times. It is also advisable to use segmentation techniques to ensure that messages are relevant to different groups of recipients. Adapting the strategy based on AI insights with tools such as Woodpecker[4] and Smartlead[11] can significantly improve the outcome of email campaigns.

5.5   ADAPTING WEBSITE CONTENT BASED ON USER BEHAVIOR

AI makes it possible to **adapt website content dynamically in real-time** based on the data stored about the visitor. By analyzing interaction data, algorithms can understand which content or products are most relevant for particular users and personalize the website accordingly. This individualization improves the user experience and can significantly increase conversion rates.

Recommendation for action: Companies should implement tools such as Hubspot[12] or Webflow[13] that enable detailed user behavior analysis to increase the effectiveness of dynamic content customization. It is essential to set clear personalization goals and evaluate them regularly to continuously improve the strategy. Experimenting with different types of personalized content can help you understand what resonates best with your target audience.

5.6   FORWARDING READY-TO-BUY CONTACTS TO THE SALES TEAM

AI systems can automatically detect when a lead is ready to be handed over to the **sales team** by analyzing purchase readiness signals and engagement levels. This ensures that the team can focus their efforts on the most promising leads, improving the **efficiency of the sales process** and increasing the conversion rate.

Recommendation for action: Companies should establish processes and systems that enable a seamless handover of leads between marketing and sales teams. The criteria for lead handover should be clearly defined and regularly updated to reflect current buying readiness signals. Training the sales team on handling AI-qualified leads can also help increase conversion rates.

5.7   DISTRIBUTING AND EVALUATING INDUSTRY STUDIES

Industry studies, white papers, and specialist articles are excellent tools for automating lead generation and lead management processes. They provide a good opportunity to address new target groups, nurture them with findings from the study, and position companies as experts in their specialist fields.

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[9] https://www.cotide.com
[10] https://www.ocean.io
[11] https://www.smartlead.ai
[12] https://www.hubspot.de
[13] https://webflow.com

Recommendation for action: Companies should opt for AI tools that go beyond mere survey creation and can generate the right contact lists and store interaction history and survey responses. These tools should be able to send personalized and relevant emails based on the information collected and evaluate each lead's readiness to buy. By using such tools, companies can maximize the added value of industry research by gaining valuable insights and using them effectively to build and deepen relationships with potential customers while demonstrating their expertise.

5.8   CUSTOMIZING WEBSITE OFFERS

AI makes it possible to dynamically adapt **website offers** based on individual user behavior and preferences. This increases the relevance of the content and products offered to the visitor. By analyzing data such as previous purchases, page views, and dwell time, predictions can be made about the interests and needs of each visitor. This leads to a higher engagement rate and improves the chances of converting leads into paying customers.

Recommendation for action: Companies should invest in technologies such as Hubspot[12] or Webflow[13] that can analyze and interpret user behavior on their websites in real-time. Implementing AI-supported tools to customize website offers can significantly improve the user experience. It is essential to carry out continuous A/B tests to measure the effectiveness of different offer variants and adjust the strategy accordingly. In addition, data protection should always be a priority so as not to jeopardize user trust.

5.9   PLANNING, ADVERTISING, CONDUCTING, AND PRESENTING WEBINARS

Automating the planning, advertising, conducting, and presentation of **webinars** with the support of AI can make the entire process more efficient and effective. AI tools can help optimize **topic identification** based on current trends and user interests, create targeted advertising campaigns, and improve participant interaction during the webinar. In addition, AI can help you **archive** and use webinar content for future marketing purposes in an intelligent way. This technology allows personalized **follow-up messages** to be sent to all participants, increasing conversion rates.

Recommendation for action: For successful implementation, companies should invest in AI-based platforms such as Livestorm[14], Contrast[15], Zoho[16] or Webex[17] that support the entire lifecycle of a webinar. Analyzing data from webinar attendees is necessary to gain insights for future content and marketing strategies. Companies should also increase interaction with attendees through AI-powered chatbots and Q&A sessions to increase retention and engagement. Continuous optimization based on participant feedback and analysis results is essential for long-term success.

Looking for or have a new use case?
Find some or share yours at
www.marketingautomation.report

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[14] https://livestorm.co
[15] https://www.getcontrast.io
[16] https://www.zoho.com
[17] https://www.webex.com

6 Opportunities and Limitations of AI

At a time when artificial intelligence is revolutionizing marketing, companies are faced with the challenge of harnessing the potential of this technology without repeating previous mistakes. The following two sections discuss the critical aspects of AI integration in sales and marketing. They offer insights into how companies can avoid difficulties and use advantages to increase efficiency, personalization, and customer loyalty.

6.1   AI INTEGRATION IN MARKETING – AVOIDING PITFALLS AND EXPLOITING POTENTIAL

Daniel Kölle, Managing Partner at atedo AG, Zurich

Companies are vying to get the best out of artificial intelligence, but the next AI gaffe could be even more destructive than Microsoft's #taytweets. It pays to learn from the mistakes of others in good time and before it is too late. If you take the proper steps now, you can turn AI into an effective tool for efficiency, personalization, and customer loyalty.

Integrating AI without a clear strategy – a dangerous game

An AI strategy based on "let's just give it a try" may do more harm than good. Using AI without a clear idea of how to integrate it into existing processes often leads to **inefficiency and frustration** within the team. According to a McKinsey study, **70 percent of AI projects fail in the pilot phase** (McKinsey & Company, 2019).

However, **avoiding AI** because of possible errors is also counterproductive. Instead, companies should pursue a structured, human-centered approach, integrating existing content and avoiding silos. They should attach importance to integrating a common prompt database, facilitating knowledge exchange, and promoting consistency in internal and external communication.

The fine line between value creation and value destruction

Customer loyalty and trust must be prioritized in these times of personalized customer experience. Here, AI offers great potential with its pronounced ability for tailored interaction, but it also harbors risks. A customer relationship remains your most valuable asset, and there is a risk of damaging this through an over-hasty use of AI. The temptation to leave communication to AI avatars is powerful, but there is a risk of **losing trust**. A study by Salesforce shows that 90 percent of consumers believe companies have a responsibility to improve the state of the world (Salesforce, 2021).

How AI can jeopardize customer loyalty

Quality deficiencies such as **hallucinations and a lack of transparency** are common with AI. Only companies with solid screening procedures avoid mistakes, such as Amazon's discriminatory recruitment system (Meyer, 2018).

Ethical aspects are crucial since AI systems can potentially make discriminatory decisions. Microsoft's AI ethics guidelines serve as a template for its own guidelines (Microsoft, n.d.).

The illusion of automation and the value of focus

No-code solutions encourage over-automation and can disrupt existing processes. A focused approach is advantageous here. Companies need to validate which AI tools support their **core workflows** efficiently.

Loss of a **corporate voice**: Unchecked generative AI texts threaten content chaos and reputational damage, as an article by Forbes Advisory reveals (Zumaeta, 2023).

Only those who avoid early mistakes and continuously learn from experience can exploit the full potential for more efficient processes and stronger customer loyalty – while maintaining high quality and ethical standards.

The way out of the AI trap – building up knowledge internally

Instead of being driven by the fear of missing the AI train, systematic **development of internal skills** is the key to success. Depending on the size of your company, the first step is to identify **AI-savvy employees** and bring them together to form a competence group. These committed "trailblazers" will enable efficient knowledge transfer within the organization.

The follow-me approach for AI newcomers

Instead of starting with the expectation that AI will revolutionize your entire business overnight, it is advisable to begin in a systematic and focused way.

1) Create an **AI topic and working team** with the members of your competence group to give yourself the necessary dynamism.

2) Pick out one or two **manageable processes** where AI can bring immediate added value. Small internal workflows are highly suitable for a successful pilot.

3) Reflect openly on the **experience and lessons learned** from this first phase. Celebrate team successes but be willing to admit your mistakes.

4) Gradually bring other **stakeholders on board** – other teams and departments will want to follow your lead.

This approach not only allows you to overcome any mistrust of AI but also to gradually build robust governance structures for sustainable integration without disrupting existing processes.

The motivating force of a concrete plan

Many companies consider the potential pitfalls of AI to be too great and remain in a state of paralysis. However, those who create the right roadmap will see this technology as an opportunity for growth and customer proximity.

The **follow-me approach** creates small-scale experiences of success in your own working environment. Even more, it builds sustainable, company-wide competencies based on the confident use of AI. Step by step, the expertise flows into your entire marketing, sales, and service ecosystem.

Anyone prepared to accept responsibility for shaping the future of their company should pursue this path.

The way forward – quality, ethics, and sensitivity

AI is not a panacea but a valuable tool that requires strategy, focus, and a lightness of touch when handling. Only those who avoid the early pitfalls and continuously learn from their experiences can exploit the full potential for more efficient processes and stronger customer loyalty – while at the same time maintaining high quality and ethical standards.

The key lies in a **systematic, people-centered development of skills** from the inside out. McKinsey advises us to begin with a **few pilot processes** to gain experience and then scale up. The example of Microsoft and its AI-controlled sales assistant shows the way (Lamarre et al., 2024).

Have the courage to take the first step today and turn AI into a virtual, productive employee.

6.2   LEAD MANAGEMENT IN B2B – A REALITY CHECK ON THE AI HYPE

Urs Thüring, CEO and Partner at Mayoris

Managers' inboxes reflect the problem only too well. In addition to the regular business emails, you will find the classic opt-in newsletters, the usual confirmation emails, phishing attacks, email spam, and – increasingly – AI-generated and automated B2B advertising campaigns encouraging you to make an appointment with an expert and ultimately wanting to win you over as a customer. Familiar examples include:

- "We hope this e-mail finds you well … "
- "I am thrilled to inform you that Mayoris has been selected by…"
- "Note: We can do as little as $2000 a month for 2 experienced Sales Professionals on Retainer to help Mayoris grow."
- "Urs - Qualified Leads for Mayoris - CRM…"
- "Hello Urs. I hope this e-mail finds you in the best of health and happiness. With your impressive experience as CEO, you have extensive expertise in email marketing, marketing automation, omnichannel communication, and data analysis for marketing purposes."

These banalities and poorly personalized messages cause the soul of a consultant specializing in new customer acquisition to dread these AI-generated, automatically sent, reminder-triggered messages with weak content. However, the frequency of emails like these is constantly growing in the age of AI.

What exactly is happening here?

Key findings from studies by established sources such as SRH University Berlin (Bünte, 2023), McKinsey (2022), and this ZHAW Marketing Automation & AI Report suggest that:

- AI support is increasing significantly in marketing, especially for consumer insights, sales & marketing, performance management, and wherever **data is available for analysis, evaluation, and targeting measures**.
- In the area of service operations, especially, significant **cost savings** can be expected thanks to AI. This is understandable given the vastly improved quality of chat and service chatbots and the use of large language models.
- **AI in marketing** is already used by almost half of managers – but only intensively by just under 20 percent. AI is set to contribute even more to business success in the coming months and years. This is not surprising, given the current trend towards AI.
- AI is usually **used in isolation** and is rarely integrated into existing processes, meaning the full potential of these software solutions is not being utilized. That was and is often the case with software.
- According to this ZHAW study, the primary use cases of AI in the lead management process include the **individualization of emails**, the continuous generation of relevant **contact data**, the integration of **purchase readiness signals**, and the improvement of reader engagement.

A confusing range of AI tools can be grouped in lead management as follows:

- Tools for AI-supported **lead generation or lead research**.
- Tools for **automation of the lead-nurturing process**.
- Automatic generation of the right **personalized content** for correspondence based on leads.

A specific process of lead generation and automated lead nurturing, namely, the arrival of a sequence of emails in the inbox, is as follows:

- With **apollo.io**[18], hundreds of decision-makers are matched from a comparison with existing address lists or found with clearly defined requirements on LinkedIn.

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[18] www.apollo.io : "Find and close your next deal, guided by the most accurate data on 275M contacts."

- An automated campaign consisting of three sequences is compiled by **app.expand.io**[19] and the content is formulated using **ChatGPT**[20].
- The content and tone of the correspondence is as follows:
    1. Contact request via **LinkedIn** is confirmed by the pinned lead. This permits the provider to contact you by email.
    2. In the **first email sequence**, the sender unobtrusively introduces themselves as an expert on a topic. As a rule, the provider does not immediately go on the sales offensive.
    3. In the **second sequence**, the topic is developed further, and it is suggested that an appointment be made with the expert to discuss the matter in more detail.
    4. If there is no response, the **third and final sequence** attempts to salvage what the previous arguments have failed to achieve by citing plausible use cases.

As the provider and creator of the lead generation campaign, we can draw the following conclusions:

- AI supports identifying and addressing **potential leads** that would only have been found – if at all – through a time-consuming manual search.
- Thanks to ChatGPT, it is finally possible to write **correct sentences**. However, the texts are mostly generic and verbose but not creative or original, so they are very quickly recognizable as having been generated by a machine. The text examples mentioned earlier reveal these shortcomings. Making a text from ChatGPT more linguistically creative can be helpful using the AI software **Deepl Write**[21].
- The installed process follows the logic that at the end of the campaign, you have numerous contacts at your disposal who, thanks to convincing arguments over three sequences and a click on the appointment agreement, have developed into the **sales opportunity.** Ideally, thanks to the intensity of the "engagement," this has also led to a **score**.

Owing to what AI can offer, it has become much easier to **identify leads** in the first place and to automate such campaigns. More and more companies are using this in the wake of the current AI hype and targeting potential B2B customers identified as "very relevant" for their products or services. In fact, AI does not always correctly predict the relevance of the person being addressed since too many individual factors confound the selection criteria of AI (e.g., timing, budget, or lack of responsibility/decision-making authority).

The core problem of AI in lead generation is a **flood of information** from emails and LinkedIn messages that people are increasingly unable to process. Since **AI works primarily on the provider side**, the only solution is the delete button or the courage to skip something when viewing mailings.

What is the outlook for recipients of this flood of mail?

Existing **ISPs** – internet service providers such as Bluewin, GMX, or Gmail – filter incoming emails for advertising, social media, and other notifications. Emails from a mailing list are also recognized. This applies, in particular, to private mail accounts and helps when ignoring or deleting emails. In the case of business email accounts, **spam filters** recognize senders who do not come from your company environment and warn of possible phishing attacks or mailings suspected of being spam.

As a recipient of lead-nurturing measures such as event registrations and downloads of white papers or studies, you should be **extra careful** about providing your email address. This is because people are afraid of the consequences.

And what about **LinkedIn**? On the one hand, this platform is increasingly becoming a mouthpiece for self-promoters and self-proclaimed entrepreneurs. On the other hand, AI filters identify a suitable user profile for acquisition measures. Indeed, LinkedIn is increasingly becoming a victim of its own success. Founded a good 20 years ago, this platform is used for purposes that the founders would hardly have thought of, thanks to AI. A platform previously used for maintaining and exchanging contacts among professionals has become a playground for research using intelligent AI software filters to win new customers. In terms of its original purpose, it has lost relevance.

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[19] www.expand.io : "The most powerful LinkedIn automation tool."
[20] www.chat.openai.com : "Free-to-use AI system. Use it to engage in conversations, gain insights, automate tasks, and witness the future of AI, all in one place."
[21] www.deepl.com/write : "Better texts in no time at all." For grammatical and spelling errors, tonality of the text, linguistic subtleties.

Targeting, relevance, automation, and personalization are core activities in data-based digital marketing, and it is hoped that they will not lose their effect. Owing to its qualitative efficiency, AI risks increasingly failing to make an impact because of the large number of use cases. However, AI needs to become even more efficient and accurate, or it will become obsolete in the face of countless providers and advertising continuously aimed at the same targets.

7 Conclusion

7.1   SUMMARY OF THE STUDY RESULTS

The eight most important findings of the Marketing Automation Report 2024 are summarized below.

1. **The use of AI in the lead management process is still limited but offers significant advantages for the quality of communication and the generation of high-quality leads.** Although the use of artificial intelligence in lead management has so far only been practiced by a minority of companies, statistical analyses show clear advantages for those that use AI technologies. In particular, the improved ability to collect detailed information about leads and enable targeted, individualized communication results in a higher-quality lead approach and generation of high-quality leads. These findings suggest that a comprehensive integration of AI across the entire lead management process increases efficiency and provides a competitive advantage.

2. **On average, companies identify 3.6 helpful AI use cases in lead management.** The high number of AI use cases that are considered helpful shows that companies recognize the diversity and potential of AI in lead management. From the personalization of communication to the optimization of marketing campaigns and the efficient management of contact lists, the potential uses of AI are seen as essential for improving lead generation and qualification. This insight reflects the growing importance of AI in the strategic planning and implementation of lead management processes aimed at increasing customer satisfaction and accelerating revenue growth.

3. **Integrating AI into marketing effectively requires a systematic approach, knowledge, and a good instinct.** A strategically well-thought-out integration of AI in marketing is essential to increase efficiency, personalization, and customer loyalty. However, an unsystematic use of AI can lead to inefficiency and frustration in the team, as many AI projects fail in the pilot phase. A human-centered approach that ensures error-free integration into existing processes is crucial to avoid losing customer trust. By fostering internal AI skills and taking a systematic approach, companies can overcome these challenges and use AI as a powerful tool in marketing.

4. **Limited resources and skills are the main obstacles to introducing AI in marketing.** Despite AI's recognized potential in marketing, most companies surveyed are confronted with limited resources and skills, which makes introducing such tools more challenging. Many companies also perceive data protection concerns and the complexity of getting started with AI technologies as hurdles. Technological limitations and a lack of prioritization by management are further barriers cited by around a fifth of respondents. These findings highlight the complexity of the challenges companies must overcome when integrating AI into their marketing strategies.

5. **Almost all companies see the potential for optimization in their lead-generation strategies.** Most companies identify optimization potential in their lead generation processes, although they already employ various approaches and technologies. This recognition of opportunities for improvement, which is shared by almost all the companies surveyed, highlights the relevance of continuous adaptation and improvement in this area.

6. **Personal networks, events, and trade fairs are increasingly relevant in lead generation.** Personal interactions and participation in events and trade fairs have proven increasingly crucial in lead generation. This post-COVID effect could indicate a desire for more authentic connections and direct communication channels in an increasingly digitized business world. At the same time, despite their potential for increasing efficiency and personalization, AI-based, dynamic email workflows are not considered necessary for lead generation success, leaving room for discussion about the optimal integration and use of AI technologies in marketing strategies.

7. **Social networks and traditional approaches such as conferences, events, and customer recommendations dominate lead research.** Over half of companies rely on social networks like LinkedIn to supplement their contact lists. This reflects the importance of up-to-date and easily accessible contact data. Conferences, events, and customer recommendations also play a central role in acquiring new leads, underlining the relevance of personal and digital word-of-mouth recommendations.

8. **In the area of lead scoring, only a few companies rely on AI-supported systems.** Despite the apparent potential offered by AI technologies for analyzing and evaluating leads, most companies rely on traditional, less advanced methods. This could be due to a lack of familiarity with the possibilities offered by AI as well as concerns about the complexity of implementation. A hesitation to use AI for lead scoring underlines the need for more training to demonstrate the benefits of AI for efficiently qualifying leads.

7.2   HOW TO PROCEED WITH LEAD GENERATION – A GUIDE

Lead generation is not just about following a clear and structured approach to that point but successfully pursuing them through to a sale. This is your extended guide to the basics of lead generation:

1. **Define your ideal customer persona (ICP):** Start with extensive research to define precisely your target group. Create segments and profiles of your ideal customers by considering their demographic characteristics, behaviors, preferences, and needs. Use surveys, interviews, and market research data to develop an in-depth understanding. This helps to focus your marketing and sales efforts, creating customized content that resonates.

2. **Trace the buyer journey:** Carefully analyze the different stages that your customers go through, from initial awareness to purchase. Consider the various points where potential customers interact with your brand, and use these insights to develop targeted content and offers that support and drive customers forward on their journey. Remember that every interaction is an opportunity to build trust and demonstrate the value of your product or service.

3. **Identify bottlenecks:** A thorough analysis of your current lead generation process is crucial to determine where leads are lost or if involvement decreases. This can affect various aspects of the process:
   a. **Lead research:** You may not effectively identify enough potential customers who match your ICP. An example of a bottleneck could be that your market research methods are outdated, or you are not capturing your target audience's latest trends and needs.
   b. **Lead generation:** The problem could be that your content or campaigns are not attracting enough attention. An example would be a conversion rate that is too low because the content offered on landing pages is too standardized and not persuasive enough.
   c. **Lead engagement:** You may be unable to keep your leads interested over time. A typical example of this would be a high abandonment rate in email communication because the messages are not personalized or relevant enough.
   d. **Lead scoring:** One bottleneck could be that you are not effectively recognizing which leads are ready to buy. For example, if leads frequently visiting your pricing page are not flagged up, you may miss out on sales opportunities.
   e. **Lead automation:** The problem could lie in inefficient or non-existent automation processes. For example, automated follow-up emails could be missing after the first contact, leading to the loss of potentially interested leads.

   By using **data analysis and customer feedback**, you can identify these weak points. A deeper understanding of these bottlenecks enables you to take targeted measures and optimize your entire lead generation and management process.

4. **Develop and experiment with solution strategies:** Develop creative and effective strategies to overcome the bottlenecks identified. Experiment with different approaches to engaging your audience, such as personalized email campaigns, targeted advertising, or valuable content offers. Remember the importance of testing and

adapting – not every tactic will be equally effective with each potential customer. The goal is to drive comprehensive engagement across the entire funnel and effectively persuade your leads to purchase.

5. **Finding the right technology:** The selection of suitable technologies for lead generation depends on functional needs and the type of support you can expect. When evaluating potential solutions, you should not only look at the functions but also consider the extent to which support and services are part of the package. This can be crucial regarding how quickly and effectively you can integrate the technology into your existing processes and how flexibly you can react to changes. Look for solutions that balance ease of use, customizability, and the level of support that meets your needs to make your lead generation strategy efficient and effective.

6. **Measure the results:** A robust analytic system is essential to measure the success of your lead generation activities and understand what is working and what needs to be improved. There are numerous frameworks for analyzing and measuring marketing effectiveness, but the **AAARRR Pirate Framework**, also known as "Pirate Metrics," stands out. Developed initially by venture capitalist Dave McClure, this model impressively visualizes the decisive steps in customer acquisition and retention. Pirate Framework aims to reduce the customer acquisition cost (CAC) and increase customer retention by helping identify **bottlenecks and optimize the process**. With a focus on awareness, acquisition, activation, revenue, retention, and referral ("AAARRR"), the framework promotes a deep understanding of each phase and offers guidance on optimization.

7.3   YOUR NEXT STEPS FOR MANAGING LEAD GENERATION

Are you ready to take your lead generation game to the next level? Take the LAMI (Lead Automation Maturity Index) assessment to see where you stand. The LAMI is specifically designed to help companies evaluate their **lead generation strategies** by providing an assessment and setting comparative standards. With this tool, you can recognize strengths, identify potential for improvement, and receive **a list of recommended tools tailored to your situation**. Start now on our project website at www.marketingautomation.report and continuously improve your automated lead generation.

> Do you need more customized tools, tips, and recommendations? Visit the website at
> www.marketingautomation.report

7.4   THE FUTURE

The outlook for lead generation using marketing automation and artificial intelligence is promising for **companies of all sizes** and offers exciting opportunities. Given these developments, an expansion of the channels through which lead generation is carried out is expected. Integrating voice assistants, chatbots, and other innovative technologies into marketing strategies will provide new ways of reaching and interacting with target groups.

To use these new channels effectively, **high-quality**, **targeted content** will be decisive for lead generation. Content marketing allows companies to build trust with their target audience and establish themselves as authorities in their field by providing valuable information, insights, and solutions. This strategic provision of content is crucial not only for attracting new leads but also for maintaining and developing existing customer relationships.

Given the importance of content in an increasingly digital world where potential customers are looking for solutions to their specific problems, content based on **proprietary data and in-depth insights** is becoming increasingly important. Companies that use their data to create relevant and engaging content will be able to make their lead generation more effective and stand out from the competition.

Companies must look specifically for **tools** that centralize customer data, enable comprehensive data collection, and take full advantage of this data-driven content. This is because the more information and context AI has at its disposal, the higher the quality of the results, especially concerning the personalization of the user experience and the design of follow-up campaigns and content. Therefore, selecting software that supports **smooth integration** with other systems is of central importance to obtain the most comprehensive data picture possible and be able to analyze and use these data effectively using AI.

In addition, continuous analysis and adaptation are crucial for companies that want to optimize their lead-generation strategies. In a constantly changing digital landscape, it is essential to remain flexible and adapt **marketing and sales strategies** based on current data and performance indicators.

Implementing an **iterative process**, in which strategies are regularly reviewed and optimized, enables companies to react quickly to market changes or the behavior of the target group. This agile approach not only maximizes the effectiveness of lead generation but also ensures that marketing budgets are used efficiently to achieve the highest possible return on investment.

Finally, promoting a **data-driven culture** within the company is of enormous importance. The successful implementation of marketing automation and AI depends heavily on the willingness of teams to engage with **data-based decision-making** and to establish continuous learning as part of the corporate culture.

Training courses, workshops, and continuing education at universities can help raise awareness of the importance of data and improve employee skills when dealing with new technologies. A well-informed and motivated team is a critical factor in the success of digital transformation and the effective use of marketing automation and AI for lead generation.

In conclusion, lead generation with marketing automation and AI for companies is **at the beginning** of a revolutionary development. Companies that master these challenges and take advantage of the opportunities offered by marketing automation and AI will have far-reaching opportunities to strengthen their market position and secure sustainable growth.

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List of Figures & Tables

List of Abbreviations

AI   Artificial Intelligence

API   Application Programming Interface

B2B   Business-to-Business

B2B2C   Business-to-Business-to-Consumer

B2C   Business-to-Consumer

BI   Business Intelligence

CAC   Customer Acquisition Cost

CHF   Swiss Franc (currency)

CEO   Chief Executive Officer

CDP   Customer Data Platform

CMS   Content Management System

CRM   Customer Relationship Manager

CTA   Call-to-Action

CX   Customer Experience

D2C   Direct-to-Consumer

DAM   Digital Asset Management

DMP   Data Management Platform

DSG   Data Protection Act

GDPR   General Data Protection Regulation

DWH   Data Warehouse

E   Electronic

EMail   Electronic Mail

ERP   Enterprise Resource Planning

IP   Internet Protocol

IT   Information Technology

KPI   Key Performance Indicator

SME   Small and Medium-Sized Enterprise

LAMI   Lead Automation Maturity Index

MA   Marketing Automation

MQL   Marketing Qualified Lead

NPO   Non-Profit Organization

NPS   Net Promoter Score

PIM   Product Information System

ROA   Return on Advertising

ROI   Return on Investment

ROMI   Return on Marketing Investment

SAP   System Analysis Program Development (Company)

SAS   Statistical Analysis System (Company/Software)

SEA   Search Engine Advertising

SEM   Search Engine Marketing

SEO   Search Engine Optimization

SMM   Social Media Marketing

SMS   Short Message Service

SQL   Sales Qualified Lead

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Dr. Darius Zumstein (Master of Arts in Management) will become Professor of Digital Marketing at the University of Applied Sciences and Arts Northwestern Switzerland (FHNW) on 1 May 2024. From October 2018 to April 2024, he was a lecturer and senior researcher at the Institute of Marketing Management IMM at ZHAW. He lectures on e-commerce, digital marketing, and digital analytics and led the CAS in Digital Sales & Marketing in B2B and CAS in Digital Commerce programs.

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Urs Thüring (LLM; MBA Bocconi) has been digitally active for over 20 years, initially in the media industry. Then, for 11 years, he built up the market-leading knowledge platform for lawyers in Switzerland (Swisslex). Today, he is CEO and a partner at Mayoris and develops this consulting company. He advises customers on the entire framework of marketing automation and relevant technologies. He has been a speaker at iab Switzerland for six years and regularly writes blogs.

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Daniel Kölle is an experienced business IT specialist with a complementary "Master in Communication Management" from the Lucerne University of Applied Sciences and Arts. He is a visionary entrepreneur who is passionate about promoting the interface between people and technology. In his more than 30 years as a senior management consultant at atedo AG, he has contributed significantly to digitalizing marketing and sales processes in companies. He is particularly distinguished by his ability to enable teams to implement and further develop these processes independently. He is currently focusing on integrating artificial intelligence into business processes to increase efficiency and create sustainable added value for employees, customers, and the company itself. Daniel strives to use the transformative power of AI to drive positive change in the world.

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Research Partners

Cotide

Cotide automates the lead generation and lead management processes for B2B companies through industry research. Cotide helps identify ready-to-buy leads through automated and personalized nurturing and continuous evaluation of new and existing contacts. This enables customers to generate qualified leads on an ongoing basis by addressing the target group in an automated and relevant manner – B2B marketing on autopilot.

Cotide is a client and publisher of the Marketing Automation Report 2021-2024 and a long-standing research partner of the Institute of Marketing Management at ZHAW.

More information: www.cotide.com

Mayoris

Mayoris stands for CRM implementation, data-based personalization of customer communication, email marketing (including interactive emails), and MarTech for customer engagement – all the basics necessary for successful marketing automation. By analyzing the client's digital communication maturity level, we advise them along the marketing automation framework, i.e., the strategy. We define specific use cases, help select the right marketing technology (Salesforce, Artegic, Apteco, Salesmanago), implement it, create relevant target group selections, build automated cycles, fill them, and activate them. In short, the entire value chain. As a research partner of the ZHAW Marketing Automation Report, Mayoris seeks to raise awareness of this discipline, especially among SMEs, so that they can stay on top of digitalization and remain competitive.

More information: www.mayoris.com/blog

atedo

atedo is a B2B consulting company that helps to drive companies and experiences forward through a unique combination of strategic consulting and creative implementation power. Measurable, realistic, and scalable, atedo focuses on corporate development, change management, corporate culture development, digital sales, and marketing.

More information: www.atedo.ch

webalysis

As a regional IT consultancy, webalyse has been supporting national and international clients in digital analytics, personalization, and marketing automation since 2010. The aim of webalyse is to measurably increase the marketing, sales and service performance of customers with methodical, analytical, and technical skills. webalyse consists of the companies webalyse marketing & consulting GmbH in Zug, webalyse GmbH in Munich, and webalyse s.r.o. in Bratislava (Slovakia).

More information: www.webalyse.org

ADVANIS

ADVANIS AG has been an independent Swiss consulting company for customer management and CRM systems since 1997. The core topics of ADVANIS range from CRM strategy, neutral evaluation, and implementation to the ongoing maintenance and further development of customer management and CRM systems. Customer requirements are met and, wherever possible, exceeded with innovative approaches such as marketing-as-a-service.

More information: www.advanis.ch

Digital B2B Forum

The Digital B2B Forum will take place on **Thursday, 24 October 2024**, from **12 noon to 7 pm at THE HALL in Dübendorf**. Readers of the Marketing Automation Report 2024 pay a **special price of CHF 100** instead of CHF 200.

More information and registration: https://digital-b2b-forum.ch

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The two new continuing education courses are:

1. **CAS AI in B2B Marketing**: This course provides practical knowledge on how AI can be used in B2B marketing to enable personalized customer approaches.

2. **CAS AI in Digital Sales**: Participants learn how AI can be used to create more efficient sales processes and better understand customer needs.

In addition, these existing CAS programs have been updated:

- **CAS Digital Sales & Marketing in B2B**: This course offers in-depth insights into digital sales strategies and shows how AI plays a vital role.

- **CAS Digital Commerce**: This course is about the challenges and opportunities in digital retail, particularly concerning AI.

You can find more information about these modular CAS programs at the Institute of Marketing Management Blog.

Possible combinations of the modular CAS:

New Modules/Continuing Education Courses

AI & Innovative Sales

This training course provides a comprehensive introduction to using artificial intelligence (AI) in sales. We cover basic principles, historical development, and a tool overview to show how AI can automate sales processes.

Other topics include data personalization, sales analysis, ethical aspects, and AI-driven customer advice. Learn more about practical insights and strategies to integrate AI and master emerging sales trends successfully.

Digital B2B Marketing

This holistic training course prepares you for the challenges of digital B2B marketing.

You will also learn about basic B2B marketing concepts, current market trends, efficient process optimization, omnichannel sales, agile working, customer management, social media marketing, inbound marketing, lead generation, data analysis, and performance measurement.

This module offers practical strategies and techniques to optimize digital B2B marketing and achieve maximum success.

AI in Digital Commerce

Discover the world of artificial intelligence in digital commerce through this comprehensive introduction. We offer a profound insight into AI applications in e-commerce and essential technologies. Learn how to improve product search and selection, generate engaging content, hyper-personalize website content, and optimize customer interactions. Find out more about innovative recommendation systems and successful AI implementation.

Immerse yourself in social and virtual commerce, including social commerce, influencer marketing, AR, VR, virtual sales platforms, bot commerce, and other future trends in e-commerce. Boost your success in digital commerce with our holistic approach to AI integration.

E-Commerce Management

Immerse yourself in the world of e-commerce with a comprehensive overview of the development of online retail, market analysis, and innovative technology trends such as social commerce and IoT. Learn all about successful business models and strategies, omnichannel management, and creating seamless customer experiences.

Optimize your online store for maximum user-friendliness and security while familiarizing yourself with payment processing, logistics, and returns management. Use digital analysis tools to measure your success and maximize your performance.

CAS Digital Commerce

The CAS in Digital Commerce offers practical and scientifically grounded specialist training for the booming online trade, enables students to design, analyze, and further develop online stores, and provides insights into the latest AI-based possibilities in e-commerce.

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Module 2 – E-Commerce Management

Starts on 23 August 2024

More information and registration here

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Deepen your expertise in this unique CAS for digital transformation in B2B, from marketing and sales to using AI for sales success.

Module 1 – AI & Innovative Sales

&

Module 2 – Digital B2B Marketing

Starts on 5 April 2024

More information and registration here

CAS AI in Digital Sales

This CAS offers sales and marketing experts the opportunity to deepen their skills in artificial intelligence, learn about practical applications for customized sales strategies, and fulfill customer requirements.

Module 1 – AI in Digital Commerce

&

Module 2 – AI & Innovative Sales

Starts on 5 April 2024
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This practical CAS offers targeted training in B2B marketing to address the increasing importance of AI and develop experts in digital transformation.

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&

Module 2 – AI in Digital Commerce

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To establish marketing automation and use artificial intelligence successfully, companies need a targeted strategy and the corresponding skills to implement it.

In addition to current best practices, this CAS looks at the risks and limitations, offering a glimpse into what will be possible with AI in the future.

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- Process and touchpoint analysis
- Customer journey
- Segmentation to hyper-personalization
- Data availability and data insights

Module 2 – Use Cases in Marketing Automation & AI:
- Implementation and project management
- Application & Tools: Lead management, cross-selling, and upselling
- Churn prevention, email marketing, content
- Channel and tool integration
- Business case, control, and learning

Starts on 19 September 2024

More information and registration here
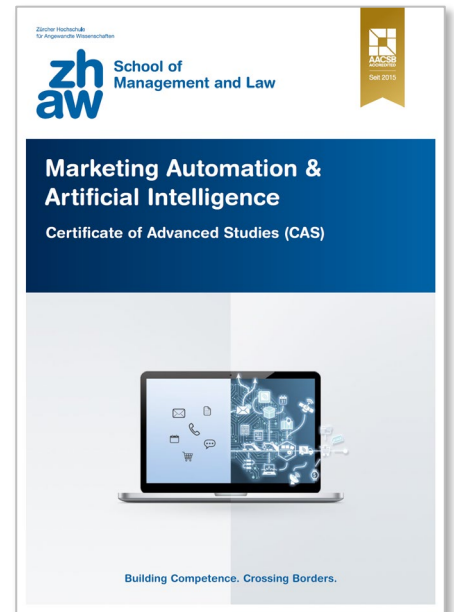
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