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Robotic Process Automation in Marketing

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ABSTRACT

Robotic process automation (RPA) refers to the use of software robots to automate highly repetitive and routine tasks that were traditionally performed by humans. It has emerged as a groundbreaking technology with the potential to revolutionize various operational facets of organizations, including marketing. This cutting-edge approach to automation is revolutionizing the way organizations execute their processes, ushering in a new era of efficiency and operational excellence. By using this transformative technology, organizations can boost operational efficiency, increase accuracy, and foster innovation, setting themselves up for long-term success in a constantly evolving market. By automating repetitive tasks, RPA enables marketing teams to focus on more strategic and creative efforts. This paper investigates the adoption of RPA in marketing operations, exploring its impact on efficiency, data accuracy, and overall effectiveness.

KEYWORDS: *automation, robotic process automation, RPA, marketing, marketing leaders.*

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INTRODUCTION

In the ever-evolving digital landscape, businesses are constantly seeking innovative solutions to streamline operations, enhance productivity, and gain a competitive edge. One such transformative technology that has emerged as a game-changer is Robotic Process Automation (RPA). RPA uses software-based virtual bots to automate repetitive or labor-intensive tasks with high accuracy and speed. RPA is radically transforming the marketing industry. From automated price adjustments to competitor monitoring and data management, RPA is proving to be an invaluable ally in the marketing field. The adoption of RPA in marketing operations represents a significant shift towards enhancing efficiency, accuracy, and strategic decision-making, ultimately transforming how marketing departments function and deliver value.

Employees spend one-third of their time on routine administrative tasks rather than the skilled work they were hired to do. Robotic process automation (RPA) can help address this imbalance. By automating repetitive processes, RPA enables marketing professionals to focus on strategic and creative tasks, resulting in accelerated campaign execution and improved productivity. The core of RPA is simple: Software-based robots mimic common human actions such as completing tables, filling out forms, or using applications. But they are not robots in the physical sense of the word. They are considered robotic because they can be programmed to take specific actions. RPA or software robot is a virtual system that helps to automate repetitive manual computing or business process tasks. RPA robots use user interfaces and application programming interfaces (API) to capture and scrape data and use applications like humans do. RPA lets your business gather more data, more quickly, and do so from any source. Properly applied, it can transform business operations [1].

WHAT IS ROBOTIC PROCESS AUTOMATION?

Among the various forms of artificial intelligence, RPA stands out for its potential to significantly increase workforce productivity by reducing or eliminating the need to do repetitive tasks manually. Popular applications of RPA include data entry, data reconciliation, spreadsheet manipulation, systems integration, automated data reporting, analytics, email notifications, acquisitions, administrative services,

finance, human resources, mission assurance, strategic communications, travel reimbursements, claims processing, and customer outreach and communications. These are just a few examples of the ways RPA is being used to remove the burden of manual, repetitive, and duplicative tasks from public service workers [2].

Robotic process automation is a form of automation software. It is a technology that can automate repetitive, rules-based tasks. Like an Excel macro operating within a spreadsheet, RPA can record actions performed across a personal computer, access systems, and perform specific tasks for human users. It uses software robots, more commonly called "bots," that mimic basic human-computer interactions. Figure 1 shows the symbol of RPA [3], while Figure 2 shows processes that RPA can automate [4]. Most industries use RPA. The government does too. Due to the repetitive nature of some tasks, the probability of human error increases. One way to eliminate errors is by using RPA.

Robotic process automation solutions fall into three key categories: attended RPA, unattended RPA and hybrid RPA, as shown in Figure 3 [5].

Robotic process automation is a type of software that mimics the activity of a human being in carrying out a task within a process. It is a technology that automates repetitive tasks using software robots. RPA uses a set of automation tools to automate repetitive tasks and manual processes performed electronically. Since RPA can automate tasks that are rule-based, manual, repetitive, and tedious, delivering the highest levels of accuracy and eradicating human errors, it is a seamless fit for the finance industry. Here are some specific examples of what RPA in finance can do [6]:

- Opening emails and joining attachments
- Automatically logging into various applications on the web
- Shifting folders and files
- Copying and pasting
- Completing forms
- Collecting data from databases and the web
- Making calculations
- Connecting to system API
- Extracting structured data from documents
- Gathering stats from social media
- Following if/then decisions and rules

Some of these tasks are displayed in Figure 4 [5].

At its core, robotic process automation (RPA) is a tool designed to mimic rule-based business processes, performing them seamlessly and without fatigue. RPA is a rule-driven method that is limited in its application. The technology functions much like a Microsoft Excel macro; the key difference is in power and reach. It follows set rules, similar to how an Excel macro works, to do things like move files or log into accounts. Growing as a popular solution in finance and accounting, RPA refers to software technology or "software robots" with artificial intelligence (AI) and machine learning (ML) capabilities. The "software robots" have the ability to learn and complete a high volume of rules-based, repetitive tasks, and business processes. They have the capacity to operate much faster than humans, with 100% precision and reliability, working around the clock.

Finance and human resources are just two examples of departments likely to have many use cases that RPA can help solve. Some examples of good use cases for RPA in finance include processing customer orders, ensuring timely vendor payments, and managing period ending financial close processes. For human resources, some examples include employee onboarding, time tracking, and leave of absence management. Processes where human judgment is needed are not appropriate for RPA since RPA automations rely on clear, consistently applied rules [7].

Along with RPA, one should be aware of both business process automation (BPA) and digital process automation (DPA) – two commonly used automation technologies that robotics process automation can be paired to optimize and streamline a digital transformation. BPA refers to the use of technology to automate complex, multi-step workflows, typically very specific to a company's core business functions. DPA offers dual power by automating processes from end to end, and optimizing common workflows that involve external human interactions (i.e. sales, management). Separately, RPA and AI are quite powerful, but leveraging them together is undoubtedly advantageous to any financial institution. When deployed together, AI is the "brains" behind RPA's bots [8].

ROBOTIC PROCESS AUTOMATION IN MARKETING

Robotic process automation (RPA) is an advanced tool of technology that makes it easy to develop, deploy, and control software bots that mimic human activities and communicate with digital systems and software. It uses software-based robots to automate business processes and reduce error risks. RPA in marketing automates repetitive, rule-based tasks like data entry, reporting, and campaign setup, freeing marketers for strategic work, increasing accuracy, and improving efficiency. RPA marks a significant change in business automation, providing a powerful

way to enhance workflows, lower costs, and create new growth and innovation opportunities.

There is now rapidly growing interest across marketing professionals towards prioritizing automation as a strategic imperative. Software robots are now driving innovation across marketing organizations. Traditionally, marketing tasks were manual, labor-intensive, and prone to human error. As marketing strategies became more sophisticated, incorporating elements such as multi-channel campaigns, real-time analytics, and personalized customer engagement, the complexity of marketing operations increased correspondingly. RPA, as a technology, is designed to automate repetitive, rule-based tasks typically performed by human employees. The application of RPA in marketing operations encompasses a wide range of activities, from automating data entry and report generation to streamlining customer interactions and campaign management. RPA not only improves productivity but also reduces the risk of errors associated with manual processes. As RPA takes over repetitive tasks, marketing teams may need to adapt by focusing on higher-value activities that require human judgment, creativity, and strategic thinking. Figure 5 shows how RPA is used in nine industries including marketing [9].

APPLICATIONS OF ROBOTIC PROCESS AUTOMATION IN MARKETING

Robotic process automation (RPA) is utilized widely across various industries and business functions because of its ability to streamline processes and increase efficiency. Common applications include automated pay-per-click (PPC) bid adjustments, competitor price monitoring, lead data entry, content scheduling, and customer data management, all leading to cost savings, better resource allocation, and enhanced customer experiences. From pricing automation, to marketing automation, to data management, RPA is making marketing operations more efficient and effective. Key applications of RPA in marketing include the following [9-12]:

- *Finance and Banking:* Banking and financial institutions are investing in RPA to improve trading, compliance, internal controls, customer service levels, and error reduction. Financial institutions are leveraging RPA solutions to transform their business operations. Common applications include automating transaction processing, managing compliance reporting, and handling customer onboarding processes. RPA helps banks offer faster, more reliable services to their customers, boosting satisfaction and loyalty. From loan processing to report generation, RPA is streamlining routine processes for banking teams.
- *Retail:* Customers expect a faster shopping experience with an uncompromising attitude towards error. RPA in retail supports various activities such as inventory, supply chain, returns processing, invoice and contract management, and store planning management. Retailers use RPA tools to enhance customer service, manage inventory, and streamline order processing. Bots can automatically update inventory levels, process returns, and handle customer inquiries in real-time, improving the shopping experience. Furthermore, RPA enables personalized marketing by analyzing customer data and tailoring promotions and recommendations to individual preferences. reducing human intervention and human error in an online sales business will give the brand a competitive advantage. By automating these processes, retailers can significantly improve efficiency, reduce manual errors, cut operational costs, and free employees to focus on more strategic, customer-centric activities. Figure 6 shows some use cases of RPA in retail management [13].
- *Advertising:* Robotic automation of processes and development reduces advertising costs in social networks by 50%. RPA is a great tool to automatically adjust bids for pay-per-click (PPC) ad campaigns for maximum impact. You can schedule when your Google Ads can go live and can increase bids when your target audience is inclined to make purchases. Marketing teams should not only focus on pricing, but also on understanding their competitors' advertising tactics. In modern advertising, visuals are elements of attraction.
- *Ecommerce:* Many ecommerce companies struggle to effectively manage their products and keep inventory levels up to date. Ecommerce retailers need to know what their inventory levels are at all times to ensure they have enough product to meet demand. RPA can streamline and expedite order tracking for you and your customers. Personalization can be a real game-changer to boosting ecommerce conversion rates. The modern online shopper wants their buying experience personalized. Figure 7 shows RPA use cases in ecommerce [14].
- *Customer Service:* Customer service is an essential part of every company. When customer service is not optimized, your company will likely see a negative impact. RPA can assist with routine tasks that take up too much time, allowing

employees to focus on fostering better customer relationships. Customers will no longer need to wait for a representative to have their questions answered.

- *Human Resources:* The human resources (HR) industry handles more than its fair share of time-consuming tasks. With RPA, HR professionals can automate daily tasks such as sending out mass emails, updating data and records, onboarding team members, and managing payroll. For example, when a new employee is hired, HR is faced with onboarding tasks and paperwork that can take more time than they have in a day. Recruitment and onboarding as well as performance management activities are some of those experiences enhanced by the AI-RPA tool.
- *Marketing Automation:* This can take over the less glamorous, manual tasks, giving your marketing team the ability to use their expertise and creativity to grow your market share. Marketing automation can include monitoring as well as additional layers of security such as encryption. It can notify you of anomalies when they occur. It also helps reduce access to information, put better controls into place, increase security, and provide compliance. RPA tools in marketing department can take care of a multitude of tasks and provide insights and opportunities you would not otherwise have. For example, you can automate email campaigns, generate reports, and manage multiple channel communications. Figure 8 shows the benefits of marketing automation [15].
- *Pricing Automation:* One of the primary applications of RPA in marketing is pricing automation. Setting competitive and accurate product prices is crucial for any business. RPA tools streamline this task by ensuring accuracy and competitiveness. By using processes such as Optical Character Recognition (OCR) and Natural Language Processing (NLP), they can automatically adjust prices within predefined margins. Beyond pricing, competitor monitoring has become a vital strategy for marketing teams. This practice allows companies to stay ahead of trends and respond effectively to market tactics. Marketing teams should not only focus on pricing, but also on understanding their competitors' advertising tactics.
- *Inventory Automation:* RPA automates critical inventory tasks, from tracking stock levels across multiple locations to processing purchase orders and updating product databases. Bots can monitor sales data, trigger reorders when stock is low, and reconcile discrepancies, ensuring optimal inventory levels. This reduces manual errors, minimizes stockouts, and enhances supply chain efficiency, improving product availability, and customer satisfaction.
- *Data Management:* Collecting information from multiple sources and in different formats poses a significant difficulty for marketers when dealing with multiple portfolios of items. Data management has become an area where robotic process automation (RPA) is making a significant mark. RPA technology has revolutionized data processing by automating repetitive tasks, improving efficiency and reducing errors. Integrated data management platforms with RPA are able to organize, analyze and use this data effectively. Automating data management tasks frees marketing teams from manual entry, allowing them to focus on data interpretation.
- *Customer Service:* Customer service departments can integrate marketing and sales inquiries with the onboarding process to streamline the customer experience. They are also better able to maintain customer relationships with omnichannel solutions by including interactions and requests in CRM systems.
- *RPA-Powered Chatbots:* Conversational marketing plays a significant role in both B2B and B2C marketing strategies. A chatbot is a dialog program built on a template script: typical questions-answers, standard actions-reactions. Combining artificial intelligence-powered chatbots with RPA technology can be highly effective in converting website visitors. When a visitor seeks certain information to aid in their decision-making process, the integrated RPA bot can quickly retrieve the requested information from various backend systems and databases, making it accessible to the visitor.
- *Financial Reporting:* For businesses that generate large volumes of financial data, RPA can automate the task of compiling and preparing reports. By automating data entry, calculation, and other tasks, RPA can help businesses reduce the time it takes to generate accurate financial reports. Robotic process automation (RPA) can be used to automate account reconciliation. RPA can be used to extract data from multiple sources, including accounting software, ERP systems, and databases.

BENEFITS

The adoption of RPA technology brings significant benefits to organizations, enhancing efficiency,

accuracy, and reducing costs. RPA automates routine tasks, freeing up employees for higher-value work and improving scalability and compliance. These robots can replicate various human-user actions, including entering data, processing transactions, and communicating with other systems. By using software robots, companies can automate many repetitive, rule-based tasks. This frees up employees to concentrate on more strategic and valuable work. Other benefits of RPA in marketing include [11]:

- *Automation*: Business process automation in general, and robotic process automation in particular, offer several benefits across business functions. Robotic process automation is one element of a larger move towards automation. Businesses choosing to go the automation route can choose between using standalone robotic process automation or combining it with advanced business process automation capabilities that seek to optimize processes across the organization. If the task is consistent, repeatable, and has decision trees that always lead to a definite outcome, it can likely be automated via bots. Robotic process automation significantly reduces the number and frequency of errors in performing repetitive tasks. It also enables 24/7 task completion without the need for human intervention.
- *Increased Efficiency:* RPA achieves the unique feat of never making human mistakes, and being available 24/7. RPA reduces the time required to carry out business tasks. RPA bots are incredibly efficient at handling repetitive tasks that traditionally require human intervention. By automating these processes, businesses can achieve tasks faster and with consistent output 24/7, thus significantly speeding up overall workflow. The implementation of RPA reduces the potential for errors in tasks.
- *Enhanced Customer Satisfaction*: Perhaps, the most exciting benefit from RPA in marketing is the application of machine learning on the marketing funnel and customer experience. Rules-based decisions in our workflow can improve by becoming experience-based over time. Today, markers want to be more involved directly in customer engagement. Through AI marketing automation, companies create highly targeted marketing initiatives, send emails, and analyze customer information. It helps in achieving improved customer satisfaction through products such as chatbots and sentiment analysis.
- *Better Employee Morale:* RPA workforce automation tools can help improve the human work experience. Instead of being tasked with data entry, employees can spend their time focused on more strategic and creative work. RPA also opens the door for staff reskilling and upskilling. With automated scripts handling manual tasks, businesses can bring employees up to speed with training in responsible AI use.
- *Better Decision-Making:* In today's digital environment, businesses rely on data-driven decisions to help various core processes in achieving their targets. Nowhere is this more important than in marketing processes where teams work swiftly and unearth actionable insights from piles of data to craft relevant strategies to stay ahead of the competition. The bottleneck in this process is the human factor; it can take extremely long to manually analyze all the available data before being able to make accurate business decisions. RPA for digital marketing can result in an extremely agile marketing department by automating the tedious process of turning big data into applicable marketing recommendations.
- *Cost Savings:* Implementing RPA can lead to substantial cost reductions. Reduction in the time and effort required to complete labor-intensive processes means less money spent on these processes. RPA lowers labor costs and the need for additional headcount for repetitive work. By automating routine tasks, companies can reduce the need for additional personnel and minimize human error, which can be costly. Over time, these savings can be significant, allowing businesses to allocate resources to more critical areas.
- *Improved Accuracy:* Human error is a common issue in manual processes, but RPA offers a solution by executing predefined tasks with high precision. This accuracy is particularly valuable in industries where even a minor mistake can have serious repercussions, such as finance and healthcare.
- *Scalability:* One of the standout features of RPA is its scalability. RPA easily handles peak demand and growth without linear increases in staffing. Businesses can easily scale their automation efforts up or down based on current needs without a corresponding increase in errors or costs. As business requirements change or volumes increase, RPA systems can be easily adjusted, scaled up, or scaled down, thereby providing a highly flexible solution to meet evolving business demands.

- *Flexibility:* Unlike traditional automation methods, RPA seamlessly integrates with existing systems and applications, eliminating the need for extensive system modifications or costly infrastructure overhauls. This agility and flexibility make RPA a highly attractive solution for businesses seeking to optimize their operations without disrupting their existing technology landscape. This flexibility is crucial for businesses looking to grow or adapt to seasonal market fluctuations.

Some benefits of RPA are depicted in Figure 9 [16].

CHALLENGES

Although RPA offers significant advantages for organizations, it comes with several potential challenges and key considerations. These include identifying processes for workforce automation, managing data quality and integration, navigating ethical governance concerns, and addressing scalability and maintenance needs. One of the primary concerns is the potential impact on the workforce. Not every process is a good fit for automation. RPA may not be the best fit for a particular application. Organizations may also encounter resistance to change from employees who are accustomed to traditional methods of working. Other challenges of RPA in marketing include the following [1,11,17]:

- *Ethical Concerns:* Ethical and regulatory considerations play a crucial role in the adoption process of RPA. RPA can introduce concerns around ethical data use. For example, if companies lack visibility into what data is being collected and how it is being used, the effect could be compliance or legal challenges. Workforce implications, including the potential displacement of certain job roles and the need for reskilling, require careful consideration and proactive management. Ensuring that RPA implementations adhere to legal and ethical standards is crucial for maintaining trust and protecting organizational reputation.
- *Compliance:* As with any technology that involves data processing and automation, organizations must ensure compliance with data protection regulations and ethical standards. Marketing teams often deal with a wealth of personal data. This requires companies, IT departments, and marketing teams to follow many laws, rules, and regulations. In the event of audits or compliance evaluations, organizations must be able to show where data was captured, how it was obtained, and what changes it has undergone. Failure to demonstrate this transparency could result in fines or sanctions.
- *Security and Privacy:* RPA tools may also introduce potential privacy and security risks. Working with internal, lead, and customer data along with multiple programs and processes requires additional security and privacy considerations. RPA implementations must be designed with privacy and security considerations in mind to protect sensitive customer information and maintain trust. This includes implementing robust data governance practices and ensuring transparency in how data is handled and processed by RPA systems. Ensuring data privacy and complying with data protection regulations are essential to maintaining customer trust and upholding ethical standards.
- *Integration:* The first obstacle often encountered is ensuring that existing systems can seamlessly integrate with RPA software. Effective RPA depends on high-quality data and the ability to integrate this data across legacy systems and modern applications. Legacy systems and modern architectures are distinctly different; what works for one may not work for another. Legacy systems may not work with modern APIs but still contain critical operational data. Because these solutions automate manual processes typically handled by humans, they are capable of finding and extracting key data from disparate and disconnected solutions.
- *Workforce:* Another primary concern is the impact of RPA on the workforce. The automation of routine tasks can lead to job displacement, particularly for roles that were previously involved in manual processes. This shift necessitates the reskilling and upskilling of employees to prepare them for new roles that focus on strategic and value-added activities. Organizations must proactively address these workforce implications by investing in training programs and providing support for employees during the transition.

FUTURE OF ROBOTIC PROCESS AUTOMATION IN MARKETING

In the field of marketing, robotic process automation (RPA) has emerged as a transformative force, streamlining complex processes and enabling marketers to refocus their efforts on strategy and creativity. Software robots, or RPA, will be a fundamental part of innovation in marketing. The field of RPA is rapidly evolving, with exciting advancements on the horizon. The future of RPA in

marketing operations holds significant potential for further innovation and growth. It is poised for continued innovation, driven by advancements in technology and evolving industry needs. Emerging technologies, such as artificial intelligence, machine learning, big data, and blockchain, are expected to enhance the capabilities of RPA systems, enabling more sophisticated automation and data analysis.

Looking to the future, the integration of artificial intelligence with RPA holds great promise for further enhancing automation capabilities. The integration promises to deliver deeper insights and more personalized marketing experiences, further advancing the effectiveness of marketing operations. It has expanded the capabilities of automation systems, enabling advanced data analysis and predictive modeling. Figure 10 shows how to enhance RPA with AI [18]. Any company that implements AI-enhancing RPA solutions in today's market will prepare for competitiveness in a market dominated by technology. Similarly, the integration of RPA with blockchain technology can enhance transparency and traceability in marketing operations, particularly in areas such as supply chain management and fraud prevention [17]. RPA is poised to completely revolutionize the business world as we know it. It is important for businesses of all sizes to get on board now and start preparing for the future of marketing.

CONCLUSION

Robotic process automation (RPA) is one of the forms of business process automation that strives to imitate human actions associated with digital systems. It is increasingly being integrated into various business functions, including marketing operations, due to its potential to enhance efficiency and effectiveness. The adoption of RPA in marketing operations represents a transformative development that has the potential to enhance efficiency, accuracy, and strategic decision-making. RPA is a powerful tool that can help businesses to streamline their marketing efforts and improve efficiency. By automating tasks, businesses can free up time for more important work, improve accuracy, and enhance the customer experience. RPA is designed to take over repetitive digital tasks. These include compiling data from various sources and applications, organizing and analyzing it, and taking prearranged actions based on the outcome [19].

Although RPA has gained a lot of attention from industry analysts, its use in marketing is currently limited. The future of RPA in marketing appears to be very promising, with many experts predicting that the technology will continue to grow and evolve in the coming years. Its integration with emerging technologies like AI/ML, AR/VR, big data, etc., will surely solve complex issues and speed up business processes with utmost efficiency. As RPA becomes more sophisticated, marketer will likely be able to automate even more complex processes, improving efficiency, and reducing costs even further [3]. More information about robotic process automation in marketing can be found in the books [20-22].

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Figure 1 Symbol of RPA [3].

Figure 2 Processes that RPA can automate [4].

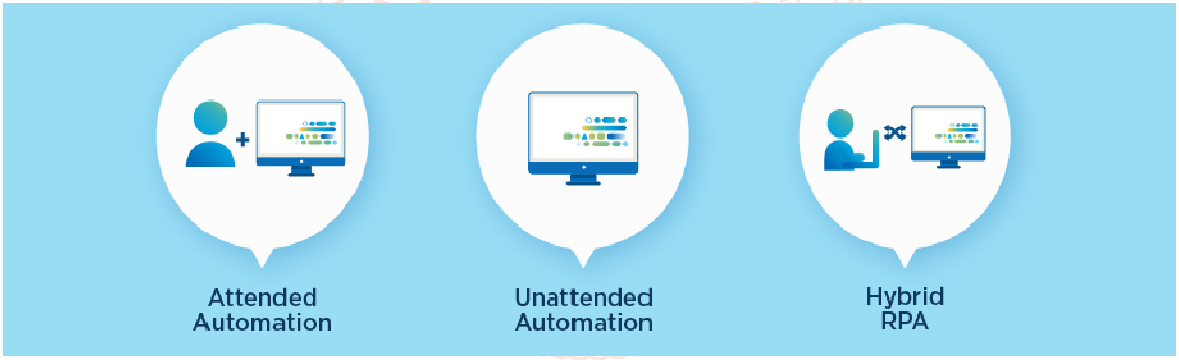

Figure 3 Three key categories of RPA [5].

Figure 4 Some tasks RPA can perform [5].

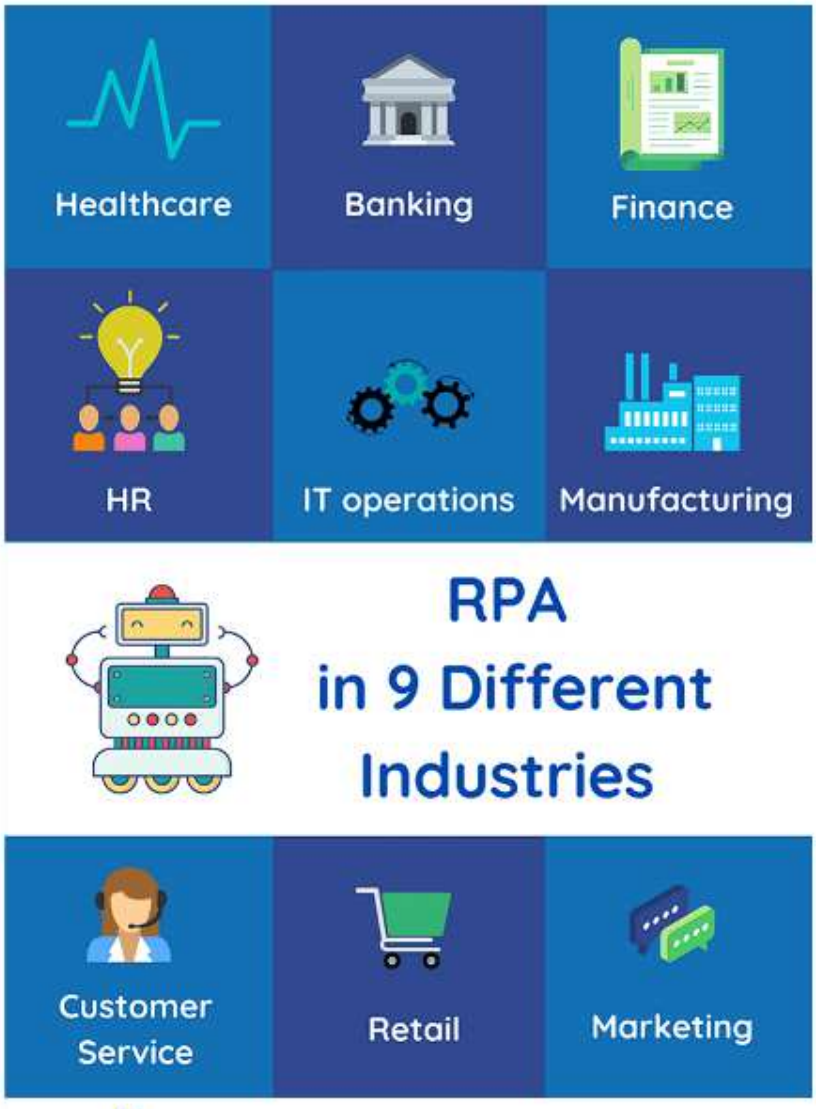

Figure 5 How RPA is used in nine industries including marketing [9].

Figure 6 Some use cases of RPA in retail management [13].

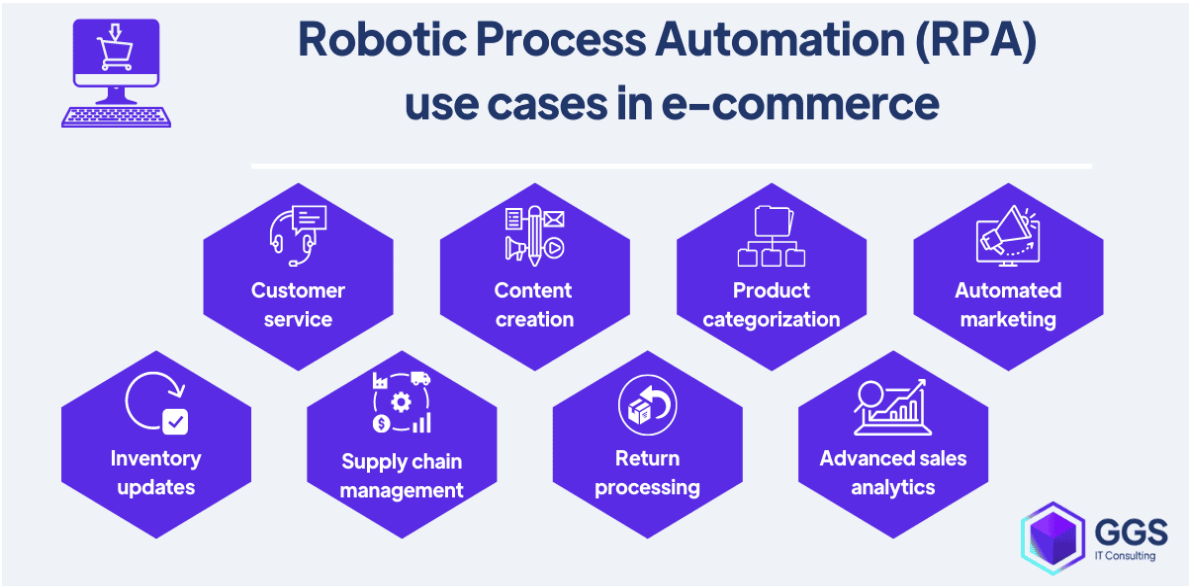

Figure 7 RPA use cases in ecommerce [14].

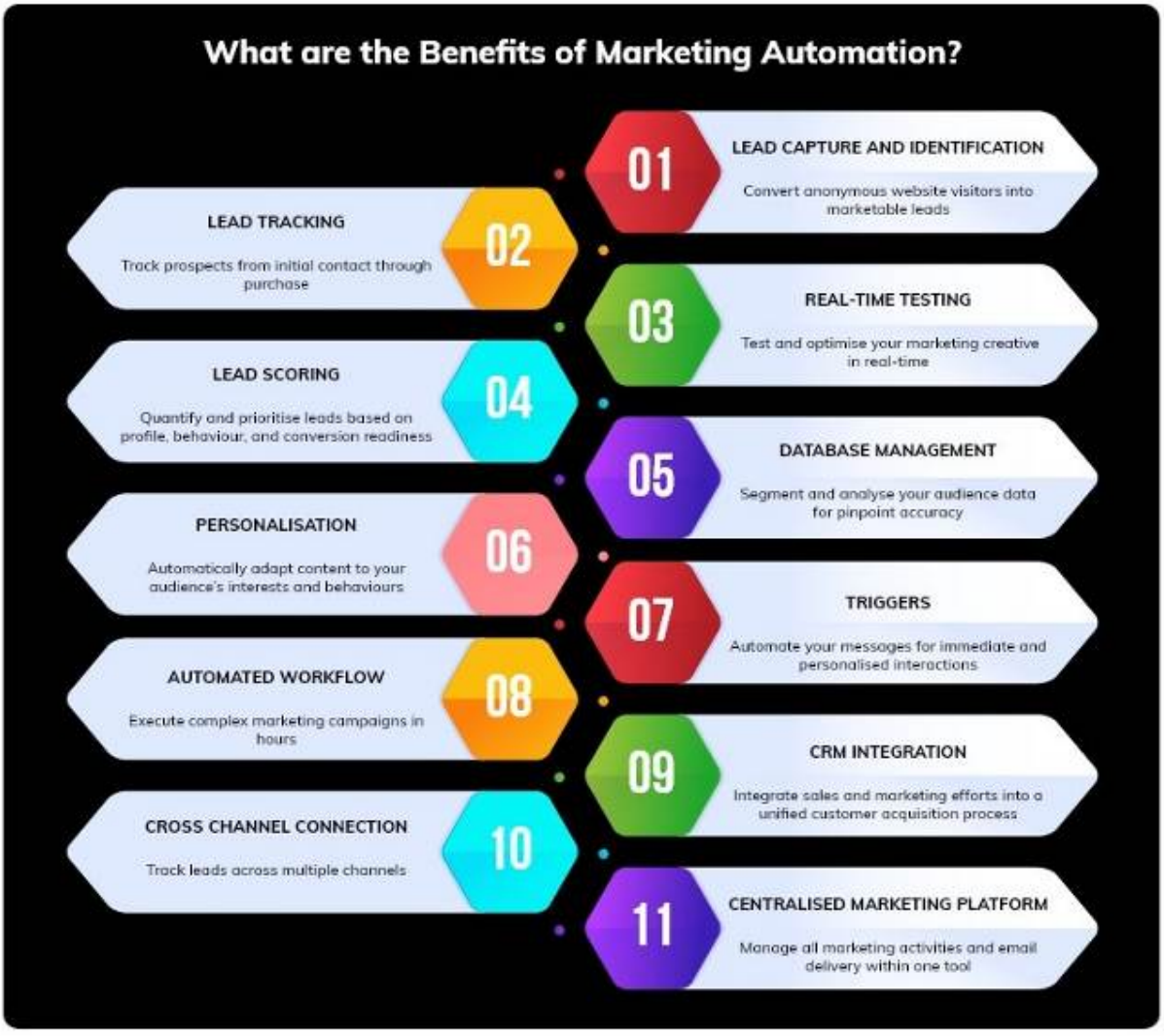

Figure 8 Some benefits of marketing automation [15].

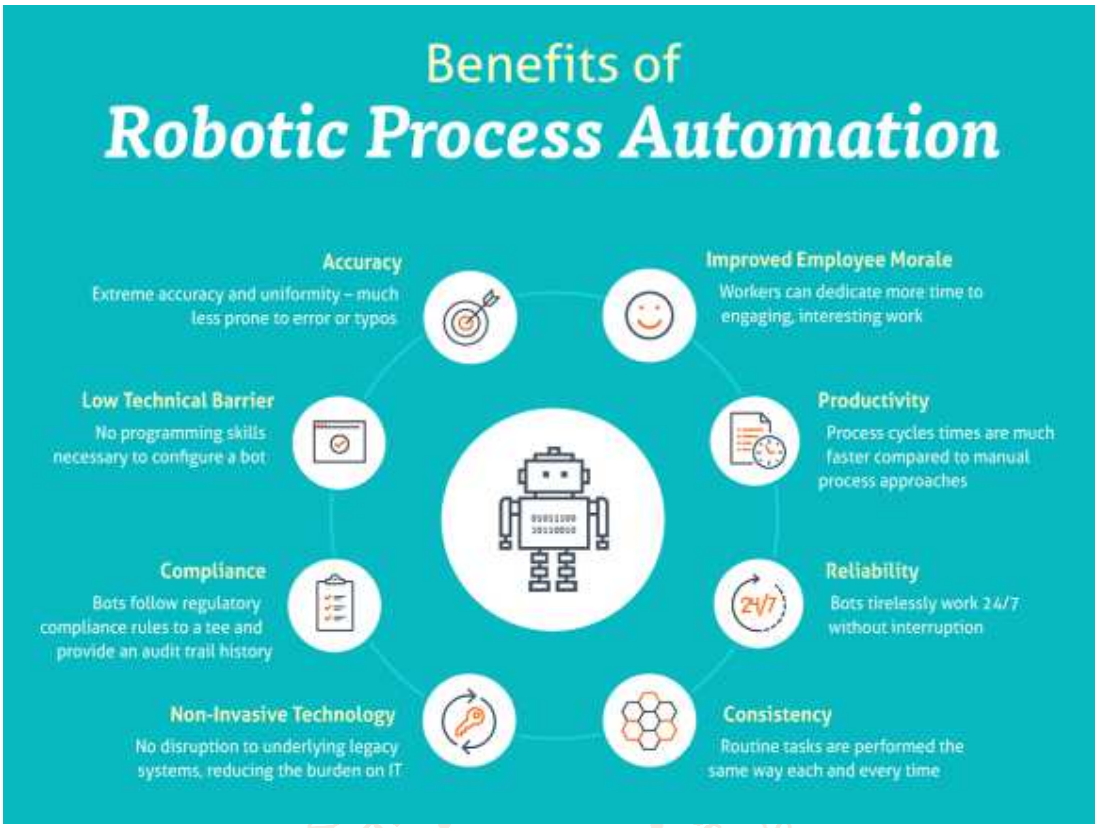

Figure 9 Some benefits of RPA [16].

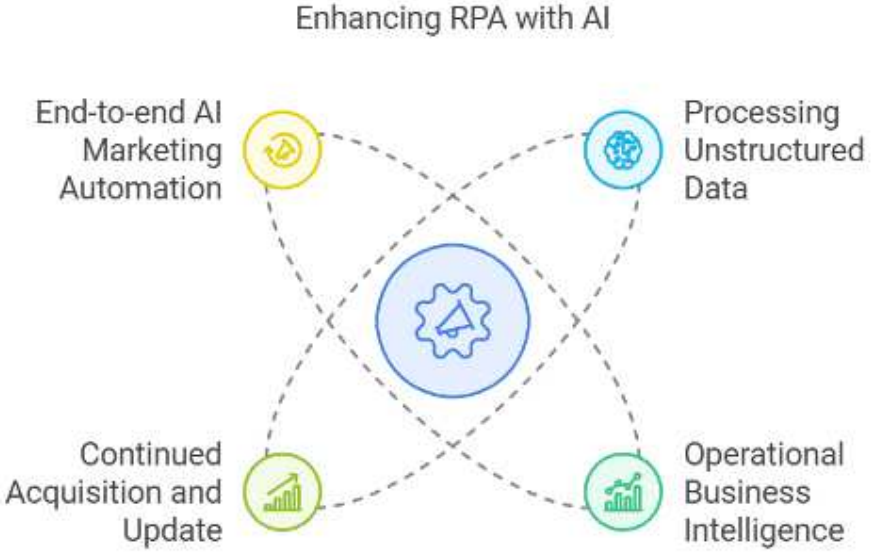

Figure 10 How to enhance RPA with AI [18].