



UNIVERSIDADE CATÓLICA PORTUGUESA

Strategizing Marketing Intelligence and data to find real time opportunities in a B2B2C environment

a Case Study of BA Glass

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Católica Porto Business School
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by

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Abstract

In today's data-driven business landscape, companies are increasingly expected to turn information into strategic advantage. Marketing Intelligence (MI) has emerged as a critical tool for enabling businesses to collect, analyse, and apply data to guide decision-making and uncover growth opportunities. However, despite its growing importance, there remains a gap in understanding how MI can be effectively implemented within complex B2B2C business models, where companies must manage layered relationships with both business partners and end consumers.

This study explores how continued improvement of MI can be applied to support strategic decision-making within a B2B2C context, using an internship at BA Glass as the foundation for investigation. The main objective is to develop a practical and streamlined framework for the evolving enhancement of MI and its implementation that reflects the particular challenges and dynamics of B2B2C operations. Through qualitative research, a case study approach, and close engagement with internal stakeholders, this thesis identifies key barriers to the effective use of MI and outlines essential steps that organizations can take to better leverage data in real time.

Findings reveal that a structured MI process—centred on defined stages, pain point identification and classification, solution development, cross-functional coordination, and enhanced data visibility—can significantly improve a company's ability to act on strategic opportunities. Although the scope of the research was limited by the duration of the internship and access to certain data segments, particularly within the B2B2C layer, this thesis presents a foundation for further exploration. It also opens the door to future research into frameworks that not only classify pain points but actively suggest actionable solutions. The

insights gained offer valuable direction for businesses seeking to optimize decision-making and build competitive strength through evolving and improving Marketing Intelligence.

Key-words: Marketing Intelligence, Strategic Decision-Making, Business-to-Business-to-Consumer, B2B2C

Resumo

No atual panorama empresarial orientado por dados, as empresas são cada vez mais desafiadas a transformar informação em vantagem estratégica. A Inteligência de Marketing (IM) surgiu como uma ferramenta essencial para permitir que as organizações recolham, analisem e apliquem dados com o objetivo de orientar a tomada de decisões e identificar oportunidades de crescimento. No entanto, apesar da sua crescente importância, continua a existir uma lacuna na compreensão de como a IM pode ser implementada de forma eficaz em modelos de negócio complexos B2B2C, onde é necessário gerir relações em camadas, tanto com parceiros comerciais como com consumidores finais.

Este estudo explora de que forma a melhoria contínua da IM pode ser aplicada para apoiar a tomada de decisões estratégicas num contexto B2B2C, utilizando um estágio na BA Glass como base para a investigação. O principal objetivo é desenvolver uma estrutura prática e simplificada para a evolução e implementação da IM, que reflita os desafios e dinâmicas específicos das operações B2B2C. Através de investigação qualitativa, uma abordagem de estudo de caso e um envolvimento próximo com os stakeholders internos, esta dissertação identifica barreiras-chave à utilização eficaz da IM e delinea os passos essenciais que as organizações podem seguir para tirar melhor partido dos dados em tempo real.

Os resultados revelam que um processo de IM estruturado — centrado em etapas definidas, identificação e classificação de pontos críticos, desenvolvimento de soluções, coordenação interfuncional e maior visibilidade dos dados — pode melhorar significativamente a capacidade de uma empresa para agir sobre oportunidades estratégicas. Embora o âmbito da investigação tenha sido limitado pela duração do estágio e pelo acesso a determinados

segmentos de dados, especialmente na camada B2B2C, esta dissertação estabelece uma base para exploração futura. Abre também caminho para investigações posteriores sobre estruturas que não só classifiquem os pontos críticos, mas proponham ativamente soluções concretas. As percepções obtidas oferecem uma direção valiosa para empresas que procuram otimizar a tomada de decisões e reforçar a sua competitividade através da evolução e melhoria da Inteligência de Marketing.

Palavras-chave: Inteligência de Marketing, Tomada de Decisões Estratégica, Business-to-Business-to-Consumer, B2B2C

Contents

Acknowledgements.....	iv
Abstract.....	vi
Contents.....	xi
Table of Figures.....	xiii
Table of Tables.....	xv
Introduction.....	17
Chapter 1: Literature Review.....	21
1.1 Marketing Intelligence.....	21
1.2 B2B2C Business Model.....	23
Chapter 2: Methodology.....	25
2.1 Research Approach.....	25
2.2 Sampling and Data Collection.....	25
2.3 Data Analysis.....	27
Chapter 3: Results.....	29
3.1 Overview of BA Glass.....	29
3.2 BA Glass' Current Marketing Intelligence Framework.....	31
3.2.1 Current Marketing Intelligence Framework and Needs.....	31
3.2.2 Weaknesses in the Current Marketing Intelligence System.....	34
Chapter 4: Discussion.....	38
4.1 Categorizing Marketing Intelligence Challenges.....	38
4.2 Implications for Practice.....	41
4.2.1 Addressing Absence of Something Pain Points.....	41
4.2.2 Addressing Course Correction/Need for Adaptation Pain Points.....	42
4.2.3 Addressing Improvement Opportunity Pain Points.....	44
Conclusion.....	46
References.....	50
Appendices.....	52

Table of Figures

Figure 1.....	42
Figure 2.....	43

Table of Tables

Table 1	26
Table 2	33

Introduction

In an increasingly data-driven world, the capacity to extract meaningful insights from information has become essential to strategic business success. Companies across industries are investing in technologies and capabilities that enable them to navigate volatile market conditions, shifting consumer behaviours, and rising competitive pressures. Among the many tools available, Marketing Intelligence (MI) has emerged as a central mechanism for firms to translate data into actionable insights. MI refers to the process of gathering, analysing, and interpreting information about the market, the customer, the competition, and the overall environment in order to support strategic decision-making (Ismaeel et al., 2023). While the benefits and challenges of MI have been extensively studied, and several frameworks attempt to outline its operational use, there remains a gap in the literature regarding how MI can be effectively applied in more specific business models—particularly Business-to-Business-to-Consumer (B2B2C) environments.

This thesis was developed within the context of an internship at BA Glass, a leading manufacturer in the glass packaging industry. During the initial stages of the internship, the organization expressed a clear need to better leverage available data to uncover and act on real-time strategic opportunities. The project was thus guided by a key question: how can a company effectively keep marketing intelligence capable of driving decisions, especially within the more intricate B2B2C landscape?

While extensive literature supports the value of data and its role in marketing performance (Ismaeel et al., 2023; Lies, 2019), there is limited research specifically focused on the application of a marketing intelligence process tailored for B2B2C settings. The B2B2C model introduces added complexity by involving multiple

stakeholders—typically a primary business, an intermediary, and the end consumer— (Mingione & Leoni, 2020) and requires nuanced approaches to data integration, interpretation, and application (Rejikumar & Asokan-Ajitha, 2023). This study, through research and a case study approach, attempts to address that gap by exploring how companies operating in such environments can apply an evolving structured MI process to extract value from data and support decision-making throughout the customer journey.

The central objective of this research is to propose a blueprint—a step-by-step framework—for applying, evolving and improving upon Marketing Intelligence systems in a B2B2C context. This blueprint aims to support firms in identifying strategic opportunities, enhancing marketing decisions, and navigating the challenges associated with MI implementation. Particular attention is given to identifying critical steps and touchpoints within the improvement of the MI process, as well as evaluating the importance of ongoing development and the preparation for future enhancements.

Two guiding research questions are addressed throughout the study:

1. How can Marketing Intelligence impact strategic decision-making in a B2B2C environment?
2. What steps should a company in a B2B2C market take to effectively extract and apply valuable information from available data?

To explore these questions, the study draws upon a comprehensive literature review covering the fields of Marketing Intelligence, B2B2C models, and digital transformation in marketing. It also integrates practical insights from the internship conducted at BA Glass, where real-world challenges and use cases informed the proposed framework. By blending theoretical insights with applied research, this thesis seeks to contribute both to academic knowledge and to managerial practice.

Following this introduction, the next chapter presents a detailed literature review covering the foundational concepts of Marketing Intelligence and B2B2C models. The subsequent chapter outlines the methodology adopted for this research. Afterward, the results derived from the internship project at BA Glass are presented and analysed. Finally, the conclusion reflects on the main findings, managerial implications through examples practiced during the internship, limitations of the study, and suggestions for future research.

Chapter 1: Literature Review

1.1 Marketing Intelligence

Marketing Intelligence (MI) is a very broad concept that is hard to define, it is an all-encompassing topic with academic and practical literature devoted to it. While there isn't a precise definition it appears that there is a consensus that MI is a comprehensive process involving the collection, analysis, and interpretation of data related to markets, competitors, and consumers. It serves as a critical tool for businesses to make informed decisions and develop effective marketing strategies (Ismaeel et al., 2023). The concept of MI encompasses several dimensions, including market research, competitive intelligence, consumer intelligence, product intelligence, and marketing analytics (Lies, 2019). MI is also sometimes defined as a process, system or even activity within a firm (Maria et al., 2020). MI at its core is the process of gathering, analysing and interpreting data about the market, the industry (namely competitors), the environment and the customers to make informed decisions (Ismaeel et al., 2023). MI significantly contributes to the efficiency and competitiveness of businesses by providing actionable insights. MI has been instrumental in identifying market opportunities, understanding consumer behaviour, and formulating effective marketing strategies (Ismaeel et al., 2023). This process involves gathering data on customer preferences, competitor actions, and market trends, which are then analysed to improve decision-making processes regarding pricing, promotion, and distribution strategies among others. By leveraging MI, firms can enhance customer satisfaction and loyalty, gain a competitive edge, and optimize operational efficiency. The components of MI include market research, which focuses on gathering and analysing data about customers and market trends, and competitive intelligence, which involves monitoring and analysing competitors' strategies (Lies, 2019). Consumer intelligence is another critical component,

providing insights into consumer preferences and behaviours, essential for predicting demand and tailoring marketing efforts. Additionally, product intelligence and marketing analytics contribute to understanding product performance and optimizing marketing tactics (Gottfried, Hartmann, & Yates, 2021). Despite its benefits, implementing MI poses several challenges. The complexity of markets and the diverse needs of customers make data collection and analysis difficult (Ismaeel et al., 2023). Furthermore, there is often a lack of skilled professionals capable of interpreting the vast amounts of data generated. Organizations may also face resistance to change and a lack of awareness regarding the benefits of MI, hindering its integration into decision-making processes. The advent of digital technologies has significantly transformed the landscape of MI. Big data, data mining, and predictive analytics have enhanced the capability of businesses to analyse large datasets and extract meaningful patterns (Lies, 2019). These technologies enable real-time data analysis, providing businesses with up-to-date insights that can drive more agile and responsive marketing strategies (Maria et al., 2020). Moreover, the integration of MI systems with digital marketing techniques, such as social media marketing and content marketing, has expanded the scope and effectiveness of MI, making it a vital component of modern marketing practices (Lies, 2019). Marketing Intelligence is a critical tool for businesses seeking to navigate the complexities of contemporary markets. It offers comprehensive insights that inform strategic decisions, enhance customer understanding, and foster competitive advantage. While challenges remain in its implementation, particularly concerning data accuracy and skilled personnel, the ongoing advancements in digital technologies promise to alleviate these issues, making MI more accessible and effective. As businesses continue to evolve in response to technological innovations, the role of MI in shaping successful marketing strategies will undoubtedly become even more pronounced. In summary Marketing

Intelligence can be defined as gathering, interpreting and using data in order to make strategic marketing decisions pertaining to the market, the industry, the environment, the firm, the competitors, the customers and the final users.

1.2 B2B2C Business Models

The concept of Business-to-Business-to-Consumer (B2B2C) represents an evolution in marketplace structures, bridging the traditional distinctions between B2B (Business-to-Business) and B2C (Business-to-Consumer) models its emergence has been often attributed to the technology and strategy advancements utilized in selling (Rejikumar G. & Asokan-Ajitha, 2023). B2B2C effectively combines elements of both B2B and B2C markets. This structure recognizes the interconnectedness of these markets, where the primary business (first B) provides products or services to another business (second B), which then reaches the final consumer (C) (Mingione & Leoni, 2020). The B2B2C framework is distinguished by its complexity and the critical role of intermediaries, who not only facilitate transactions but also enhance customer experience through value-added services. These services can include customer management, information feedback, and decision support among others, positioning the intermediary as a key player in the value chain (Wang et al., 2011). The intermediary's role extends beyond mere facilitation, incorporating functions such as database management and providing platforms for interaction, thus enabling seamless integration across the supply chain (Wang et al., 2011). Technological advancements have further propelled the B2B2C model, particularly through digital platforms that streamline the distribution and marketing processes. These platforms serve as the conduit through which businesses can reach end consumers, often enhancing the efficiency and effectiveness of marketing efforts (Rejikumar & Asokan-Ajitha, 2023) take for example a restaurant that resorts to services like Uber Eats to reach its final customers. In a B2B2C arrangement, the end customer experience is a

shared focus of the business partners involved, as both entities work collaboratively to deliver a cohesive service that enhances customer satisfaction and loyalty (Rejikumar & Asokan-Ajitha, 2023). Moreover, B2B2C models facilitate closer integration within the supply chain, enhancing the ability of businesses to add value throughout the product lifecycle. By leveraging the strengths of both business partners, B2B2C arrangements not only improve service delivery but also optimize the utilization of resources, from manufacturing to terminal retail (Wang et al., 2011). This synergy between partners helps in achieving economies of scope and long-term benefits, thereby contributing to the sustainability and growth of businesses operating within this model (Mingione & Leoni, 2020). In conclusion, the B2B2C model is a sophisticated market structure that effectively integrates B2B and B2C elements to provide enhanced value to end consumers. It leverages the capabilities of intermediaries and digital platforms to deliver comprehensive customer experiences, thereby fostering stronger customer relationships and business efficiencies and achieving a business relationship far more complex than a simple retailer or wholesaler relationship.

Chapter 2: Methodology

2.1 Research Approach

This research utilized a case study methodology to investigate how to strategize marketing intelligence in a B2B2C industry to identify real-time opportunities. A case study approach was selected due to its ability to offer an in-depth exploration of a specific phenomenon within its real-life context, uncovering layers of meaning and subtleties that might otherwise remain obscured (Stake, 2003). This method allowed for a thorough understanding of how marketing intelligence processes are structured, managed, and optimized within the organization under study—BA Glass.

A qualitative study approach was adopted for data collection, as it enables researchers to comprehend the context in which decisions and actions take place, providing insights into the rationale behind human behaviours and organizational phenomena (Myers, 2013). This approach was particularly relevant for examining the intricacies of marketing intelligence, which relies on human interpretation, judgment, and interaction with market dynamics. Furthermore, at the centre of this research are the individuals working at the firm, the ones who are the most knowledgeable and can explain in the clearest of terms what is it they do, how they do it and why they do it (Gioia, 2021) introducing perspectives that, while not necessarily based on theory, are a more realistic representation of what really is the truth.

2.2 Sampling and Data Collection

Primary data was collected through semi-structured interviews, which facilitated in-depth discussions regarding the existing marketing intelligence framework, its challenges, and potential improvements. As Adams (2015)

highlights, semi-structured interviews provide an opportunity to understand how and why events occur, as well as the concerns of those involved. This method employs a combination of closed- and open-ended questions, often accompanied by follow-up queries to delve deeper into responses (Adams, 2015). The flexibility of this approach allows researchers to adapt questions dynamically, ensuring that emerging themes and relevant insights are thoroughly explored (Adeoye-Olatunde & Olenik, 2021).

The 12 interviews were conducted conversationally with one or two respondents at a time (for a total of 10 people), adhering to the recommended one-hour maximum duration to minimize fatigue for both the interviewer and the participants (Adams, 2015) (see table 1 for specific information on each interviewee).

Interview Number	Interviewee	Role	Seniority (in years)
1	Diogo Santos	Marketing & Pricing - Soft Drinks Specialist	2
1	Mário Oliveira	Marketing & Pricing - Food Specialist	3
2	Diogo Dias	Marketing & Pricing - Beer Specialist	3
2	Francisco Almeida	Marketing & Pricing - Wine & Spirits Specialist	1
3	Pedro Galho	Marketing & Pricing Manager	14
4	Joana Faria Ribeiro	Business Development Manager	10
5	Luís Gomes	BA Design	9
6	Diogo Couto	Germany Country Sales Manager	7
7	José Maria San Juan	Business Unit Leader Soft Drinks	26
8	Paula Marinho	Business Unit Leader Wine & Spirits	8
9	Ana Tenreiro	Business Unit Leader Food	2
10	Miguel Horta	Business Unit Leader Beer	10

Table 1: BA Glass personnel interviewed

The participants were selected based on their roles and proximity to marketing intelligence processes within BA Glass, ensuring that they could provide relevant insights into the subject matter as well as the innerworkings of the industry and the degree of influence and impact of each stakeholder. The interview script (refer to Appendix 1, Appendix 2 and Appendix 3), while pre-structured,

allowed room for adjustments based on the flow of conversation and the emergence of unexpected yet pertinent topics, it also was adjusted according to the respondents being interviewed.

Secondary data sources were also employed to complement the findings from interviews. This included internal documents, reports, and digital tools used within the marketing intelligence framework, offering a broader perspective on the organizational processes and decision-making mechanisms, some examples were industry reports, internal marketing presentations, specific regional market information presentations, an internal database that covered many sales related KPIs and information on ongoing marketing intelligence projects.

2.3 Data Analysis

The collected qualitative data was analysed using thematic analysis, a method that identifies themes and patterns of meaning across the dataset in relation to the research topic (Braun & Clarke, 2013). This process included the transcription of the interviews, reading and familiarization with the data while highlighting key elements, coding data points relevant to the research question, identifying themes, reviewing the themes and organizing them and analysing the themes.

Given the nature of qualitative research, the initial stages of analysis involved a vast number of informant-generated terms, codes, and categories, which were later refined to identify recurring patterns and key insights (Gioia, 2021). The first-order analysis primarily focused on categorizing responses without immediate synthesis, allowing for an extensive capture of participant perspectives. This was followed by a second-order analysis, which involved identifying similarities and differences among the categories, leading to the reduction and consolidation of key themes. The analysis sought to uncover deeper insights beyond what was explicitly stated by respondents, addressing the central question: "What's happening here?". This interpretative process

facilitated the formulation of refined concepts and relationships, which were further explored through subsequent interviews and data collection phases.

By following this structured methodological approach, the research aimed to provide a comprehensive understanding of marketing intelligence strategies within a B2B2C context, offering insights that could improve real-time opportunity identification and strategic decision-making.

Chapter 3: Results

3.1 Overview of BA Glass

BA Glass, originally founded in 1912 as Barbosa & Almeida, Lda., is a leading European manufacturer of glass packaging. The company was established by Raúl da Silva Barbosa and Domingos de Almeida, initially operating as a small-scale glass bottle producer. Over the decades, BA Glass expanded significantly, introducing semi-automatic bottle production in 1930 at its Campanhã plant and later transitioning to fully automated systems with the introduction of molding machines in 1947 and automatic feeding technology in 1965.

The company continued its growth through strategic acquisitions, including CIVE in Marinha Grande (1993), Vilesa in Spain (1999), and the SOTANCRO Group in 2008, strengthening its presence in the Iberian Peninsula.

BA Glass took a major step toward internationalization in 2012 by acquiring Warta Glass in Poland, extending its reach beyond Southern Europe. This expansion continued with the acquisition of the German company HNG Global in 2016 and the Yioula Group in 2017. The firm further expanded adding production facilities in Bulgaria, Romania and even Mexico (among others) and even facilities dedicated to recycling in the UK. Today, BA Glass operates several plants across multiple European countries, producing more than 30 million glass units per day. The company's headquarters remain in Avintes, Portugal.

Operating within a highly competitive and capital-intensive industry, BA Glass must continuously optimize its production and anticipate market demands. Given the high costs of machinery, maintenance, and long cash conversion cycles, efficient production planning and accurate forecasting of customer orders are essential. This is where marketing intelligence plays a critical role, providing real-time insights into customer trends and guiding strategic decision-making.

The company's business is segmented into four key segments: Beer, Food, Wine & Spirits, and Soft Drinks. Each represents a core pillar of BA Glass's business and has distinct strategies, sub-segments, customer bases, and unique needs. This segmentation necessitates a tailored approach to marketing intelligence for each division. Specialized teams and Business Unit Leaders are established to manage the specific needs of each segment, ensuring a cohesive strategy across the segment and that marketing intelligence remains relevant and effective for the diverse set of stakeholders within the company.

As a B2B2C company, BA Glass not only serves direct business clients but also considers end-consumer preferences when designing its products. Changes in market demand—such as the rise of non-alcoholic beverages—can influence bottle designs, colours, and weights, requiring the company to stay agile and keep “a close ear to the ground”. To maintain competitiveness, BA Glass relies on a structured marketing intelligence framework, segmented by product category, to monitor industry trends and customer behaviour effectively.

The research was conducted through an internship at BA Glass, with a focus on improving marketing intelligence tools to better identify real-time opportunities within the B2B2C environment, as well as other tasks related to marketing intelligence such as industry news monitoring and summarizing quarterly reports from key industry players, competitors and customers alike. The researcher was placed alongside the Marketing & Pricing team, the ones responsible for price setting and many of the marketing endeavours at the firm, including but not limited to country specific market research, expansion opportunity exploration, segment performance tracking. This team also spends significant time with the Business Unit Leaders (each member being assigned a specific Business Unit Leader and therefore a specific segment) who give them segment specific marketing intelligence tasks on a need-by-need basis.

BA Glass' strategy tackles a highly competitive and developed environment driven by production efficiency, demanding customers and consumers, and volatile market trends.

3.2 BA Glass's Current Marketing Intelligence Framework

A key component of this research was the series of interviews conducted as well as complementary secondary data gathered during the internship at BA Glass. The primary objective of these interviews was to gain a deeper understanding of the industry, the company's internal operations, and the state as well as the role of marketing intelligence within the organization. Specifically, the interviews aimed to assess the marketing intelligence framework, its key stakeholders—including users, creators, and those most impacted by it—and to evaluate their needs, strategic influence, and contributions.

A total of 12 individuals were subjected to 1-hour interviews for a total of 10 interviews (see table 1 for specific information on each interviewee).

3.2.1 Current Marketing Intelligence Framework and Needs

From the interviews it was discerned that both the Business Unit Leaders and the Marketing & Pricing team appeared to be the primary users and processors of marketing intelligence data, utilizing it to define strategy, to analyse current trends as well as opportunities and threats, to support pricing strategies, among other tasks and duties. Their work heavily depends on consumption of data, segment specific information, competition evaluation and analysis of packaging as well as consumer trends.

Business Unit Leaders (BULs), who oversee strategic decision-making within each segment revealed how distinct the specific needs, challenges and market dynamics are from segment to segment, take for example, Beer is a stable segment with large clients, yet faces growing pressure from alternative

packaging competitors (namely cans and kegs); Wine & Spirits doesn't face a significant threat from alternative packaging, but struggles with smaller clients with high expectations and demands while being the most sensitive segment to legal restrictions; Soft Drinks segment is mostly focused on the on-trade/HORECA channel as glass represents a mere fraction of off-trade sales, and struggles with the lack of available data on key strategic changes to the industry (such as the lack of information around returnable bottles); the Food segment struggles with numerous subsegments which make it hard to comprehensively track trends and to analyse as a cohesive business unit, making it a more demanding and fragmented segment. These differences between segments make it imperative for the marketing intelligence apparatus to adapt and accommodate all these different needs and challenges.

BA Glass extracts data from various tools and databases it resorts to both industry reports and widely accepted and used (within the industry), but expensive, consulting reports. The firm also uses a specific developed tool that can track multiple sales and production indicators that is capable of being updated monthly and showcases predictions for specific indicators that are also updated on a monthly basis. Lastly the company utilizes a CRM platform, in which it tracks, among others, key sales performance indicators and customer meeting reports. These last-mentioned reports were one of the main sources of information that came from customers. The interviews revealed that due to the highly restrictive nature of accessing market data, anything revealed by customers could be extremely valuable information and should be gathered and analysed.

Sales teams often contribute valuable insights from direct client contact, which are expected to be documented in these meeting reports. However, as will be detailed in following sections, this process is fraught with inconsistencies.

A common complaint of the MI was that the sources of information were fragmented, rarely centralized and required significant study and/or preparation which limited timely and strategic decision making.

Interview	Interview – Insights
1-2	Highlighted the importance of structured data and analytics in shaping pricing strategies and market positioning; provided contextual input about their respective segments; expressed frustration over issues related to data accuracy, limited accessibility, and delayed availability which hindered thorough market analysis and obligated a more reactive approach to MI over a proactive one
3	Offered a more strategic perspective on the company’s marketing intelligence practices, informed by the manager’s long experience at BA Glass; raised issue about the limited access to reliable market and competitor data, and access particularly to production metrics, which are either unavailable or costly to obtain forcing consumption data as a sort of proxy
4	Discussed how BA Glass coordinates its corporate strategy across business segments; underscored the vital role of tracking, predicting, and understanding customer trends as they influence production planning with concerns about the current tools’ and processes’ capacity to support such foresight
5	Shed a light on the close collaboration between BA Glass and its clients; emphasized the value of informal intelligence gathered through direct client interactions, which often reveal unique preferences and market demands it also became clear that such insights are not systematically captured or integrated into broader marketing intelligence processes
6	Provided a sales-side view of how marketing intelligence is collected and used; emphasized a generally reactive stance toward market changes; key finding was the underperformance of the meeting report system, reports were inconsistently completed, often lacking critical data, which compromised their utility
7	Revealed segment specific needs and details; emphasized the need for real-time, organized information and criticized the decentralized and disorganized way internal data is stored and retrieved
8	Revealed segment specific needs and details; noted that legal limitations and niche client requirements are not adequately captured by current systems; Highlighted importance of customer shared information; expressed dissatisfaction with the meeting report system, describing it as cluttered, inconsistent, and poorly maintained; Confessed lack of a structured and reliable feedback loop from the sales team reports
9	Revealed segment specific needs and details; spoke of struggles to maintain a coherent overview of market dynamics due to subsegment fragmentation; pointed out that customer insights are vital, yet meeting reports are often overloaded with irrelevant information or missing critical points, making them ineffective for decision-making
10	Revealed segment specific needs and details; spoke in lengths about the importance of emerging threats (namely alternate packaging such as kegs and cans); flagged difficulties in efficiently accessing and interpreting internal sales and production data, citing the lack of a centralized, user-friendly platform

Table 2: Insights gathered in each interview

3.2.2 Weaknesses in the Current Marketing Intelligence System

An important step towards improving Marketing Intelligence is to identify its misgivings, addressing them and enhancing the benefits of the data and its analysis. Based on the qualitative data collected, several key pain points in the firm's MI were identified across strategic, data-related, and technological domains. These are detailed below:

- a) **Reactive rather than proactive usage:** a recurring theme across departments was the reactive nature of MI usage. This was attributed to multiple factors, namely the time constraints, the lack of central guidance and the nature of the data as well as the retrieval of said data, take for example the analysis of the financial quarterly reports that is done sometimes weeks after the original release. This forces most strategic decisions to be made without full backing of anticipatory data and prevents forward looking strategy and research.
- b) **Lack of MI strategy alignment and cohesion:** this problem can be felt both through departments but also through segments. While efforts to utilize marketing intelligence are present across departments, there is an opportunity to enhance strategic alignment through a more unified, company-wide approach. In certain situations, interdepartmental communication could be strengthened to ensure that relevant information flows more consistently and effectively across teams. Take for example the meeting reports system, sales representatives fail to fill them and complain that they don't know if anyone ends up reading them, while on the other hand, Business Unit Leaders find the reports cluttered with non-relevant data and have a hard time filtering both the reports and the information that should be contained within them. This lack of coordination creates inconsistencies, lack of efficiency,

confusion and the loss of valuable insights preventing the potential usefulness of MI.

- c) **Absence of centralized access to information:** there were several complaints around the necessity of preparing information, this was derived from having to manually work information taken from different tools and projects. This resulted in time taken away from important analyses, potential human error, and different or inconsistent conclusions derived from the same data. It also resulted in occasionally having to find and fix data inconsistencies across the different systems, tools and/or platforms. This weakened analysis and insights creating further misgiving across the firm's MI.
- d) **Unfiltered unorganized data:** the large sums of data that is gathered by the firm requires organization and filtering in order to be efficiently analysed, studied and turned into insights that might be used for strategic decision making. The problem detected was that the data gathered by the firm often lacked organization and the means to timely filter required information. Business Unit Leaders, for example, struggled with finding useful information in the cluttered data that was derived from the long, unstructured and unorganized meeting reports. This often resulted in the non-use of these reports and the discarding of possibly vital insights.
- e) **Lack of access to relevant data:** this issue was specially derived from the nature of the industry and the vastness of the business of the firm. It was not economically feasible nor realistic to be able to access data across the different segments and across the different geographical markets. During the interviews there were complaints that the type of deep analysis and research of some information required a lot of time and manual labour (which as was previously covered wasn't possible)

or demanded resorting to accessing external paid databases that were simply too expensive or didn't cover all segments and/or markets. Sometimes the information looked for was not even possible to access, take for example the common issue with gathering customer production data. This was unattainable and resulted in the use of more commonly shared consumer data that might not fully represent the reality. There were also legal restrictions to studying data on competition resulting in a distinct inability to analyse the market as a whole. These struggles are hard to overcome and represent blind spots in MI resulting in strategic decision making that is not fully informed.

- f) **Inconsistent/unreliable data:** this issue is slightly derived from the previously mentioned closedness of the industry, sources of data are few and access to them is restricted, so cases like different data sources acquired result in different data, one such examples was when the firm discovered that a previously used data source was inconsistent with industry reports and internal data, making it an unreliable source. Despite this, due to the lack of information overall, the unreliable data source was still used for the analysis of trends in conjunction with other data sources. This results in uncertain decision making derived from unreliable data sources harming the MI of the firm.
- g) **Underused or misused systems:** multiple systems within the marketing intelligence have faltered when it comes to updating themselves and remaining relevant. This can be due to market changes, new technology that is simply more efficient or many other motives. The problem originates when a system, tool or program is unable to fulfil its purpose or is failing to live up to its potential. Take for example the customer meeting reports, they are a crucial way for the information shared from clients to reach the firm's collaborators, yet they are

unorganized, underused and unable to effectively guide the information to those that matter most. There are complaints from both the writers and supposed readers of these reports. Like this system, there are others, and these problems hamper the ability for MI to effectively enhance strategic decision making. These problems should be detected and addressed consistently ensuring regular updates to the MI apparatus. In this way a firm can ensure the reliability of both the data gathering and preparation.

The analysis of the current state of Marketing Intelligence at BA Glass reveals a fragmented, reactive, and partially underutilized system. Despite a wealth of valuable internal and external data, the occasional lack of strategic direction, the absence of centralized tools, and inconsistent reporting practices significantly hinders the company's ability to leverage marketing intelligence effectively across its B2B2C operations.

These findings reinforce the need for a structured, centralized MI framework that is tailored to the distinct needs of the business ensuring that the marketing intelligence apparatus is in constant improvement addressing pain points across its systems, the use of the information and the preparation of data.

The next phase of the research involved systematically organizing the insights gathered from the interviews and other internal sources, such as company documents and feedback on the meeting report system. Firstly, the positive and negative observations of the marketing intelligence apparatus were separated. Then due to the time constraints the primary focus was on identifying shortcomings in the marketing intelligence framework to improve, maintain, and update it for more effective decision-making therefore contributing to the firm's strategy based on marketing intelligence. A key finding of the research was that solutions do not always need to be developed from scratch. Incremental improvements are often more effective than attempting to build an entirely new

system. Thus, it is crucial to establish a structured framework to identify and address key issues systematically.

Chapter 4: Discussion

4.1 Categorizing Marketing Intelligence Challenges

A core finding of this research was that categorizing marketing intelligence challenges and feedback into distinct pain point types provided clarity in diagnosing inefficiencies and/or any misgiving, and in determining appropriate solutions. In this sense, to categorize the pain points in a way that creates a clearer path for the development of possible solutions, 3 primary pain point categories emerged during the research and during the internship:

1. **Absence of Something:** These pain points stem from a missing system, or something that is not being considered, a lack of specific information or a limitation not yet addressed. These issues can be considered blind spots in marketing intelligence and require a more substantial “fix”, they are often something that is missed when developing the marketing intelligence of a firm, but they can also originate from other limitations, for example a lack of reliable, timely and verified information sources. These pain points can be hard to address sometimes they might not even be possible to fix and must be then taken as an obstacle that needs to be overcome. Addressing these issues requires substantial effort, such as designing entirely new solutions or significantly upgrading existing systems. During this internship one such pain point was the confusion derived from the lack of organization of all the information available, the struggles that came from the missing centralization of the information and the longer workload that resulted in harder analysis. This represented an important part of the marketing intelligence apparatus that was missing, a problem that simply wasn't being addressed and therefore it needed to be solved in order to improve the marketing intelligence apparatus.

2. **Course Correction/Need for Adaptation:** These pain points stem from systems or processes that are underutilized, misused or with mistakes, no longer fit for purpose, or something simply incapable or not practical. These issues originate from problems with the current marketing intelligence apparatus, they can be, for example, problems with how information is handled or the reliability of a source, they can also be found in systems that have not been updated and are not used to complete their purpose and/or function. Solutions in this category range from minor modifications to complete system overhauls, either way these pain points need to be addressed in order to maintain the marketing intelligence apparatus and ensure that it remains effective, relevant, and up to date. The research, through the internship, was able to identify some of these pain points from the interviews, it revealed some misgivings with BA Glass' meeting report system, one of, if not the most important/main ways of reporting and sharing information derived from customers. The issues stemmed from the fact that the system was not being used and lacked better filtering and organization. This resulted in a lackluster use of the available information and the loss of valuable data as well. These misgivings were not being addressed and because of it, the system was not adequately attending the issue that it was supposed to solve, it was a blind spot in the marketing intelligence that in theory should have already been covered but in practice it was far from it.
3. **Improvement Opportunity:** Unlike the previous two categories, these pain points do not necessarily represent urgent issues but rather areas where enhancements could optimize efficiency. They include inefficiencies in current processes, outdated methodologies, or neglected aspects that could be improved through modernization, automation, or technological integration. These pain points might be turning into issues

or be the future cause or real problems, or they can simply be inefficiencies in the marketing intelligence apparatus. In order for one to address these pain points, a smaller modification is indicated, an improvement or update, maybe the integration of new technology. Proactively addressing these issues prevents them from developing into more significant problems, and/or allows the firm to capitalize on the full potential of the marketing intelligence apparatus. During the internship a pain point of this category was detected in one of the tasks, the news publications, there were complaints that the news weren't always adequate for all the people that received them, the process of researching and filtering news took a lot of time and manual work and the end result sometimes was not worth the effort that it took. Still the news reporting was an important part of the marketing intelligence, but it was not living up to the full potential, it lacked automation and targeted dissemination towards specific audiences.

This categorization provides a structured approach to diagnosing marketing intelligence inefficiencies and developing targeted solutions helping fast track solution development, ensuring that the path towards the constant demanded improvement, updating and maintenance of the marketing intelligence is smooth and clearer, ensuring better and more timely decision-making and marketing strategy planning. It helps understand the grievances with the marketing intelligence apparatus and how to address them. By addressing these pain points systematically, BA Glass can enhance the usability of its marketing intelligence framework, ensuring that decision-making remains timely, informed, and strategically relevant.

4.2 Implications for practice

Throughout the internship, the classification of marketing intelligence pain points proved to be a valuable tool in diagnosing and addressing various shortcomings within BA Glass' marketing intelligence apparatus and helped address some misgivings through a series of proposed solutions. By applying this categorization, it was possible to systematically analyse inefficiencies and develop targeted, actionable solutions. To demonstrate the utility of this framework, three concrete solutions were proposed—each corresponding to one of the three pain point categories—offering a tangible example of how firms can approach the continuous improvement of their marketing intelligence systems and further exploring the proposed classification.

4.2.1 Addressing Absence of Something Pain Points

One of the pressing blind spots identified was the lack of a centralized system for the business unit leaders to access segment-specific information efficiently. This absence made it more time-consuming to visualize and cross-reference key performance indicators (KPIs), such as units sold and total sales value, in a centralized and easily interpretable format, which hindered timely analysis and decision-making; and analysing critical business insights. To address this, an interactive Excel dashboard was developed. This tool consolidated existing internal data and key KPIs, offering dynamic visualizations through multiple graphs and scenario-based forecasting. The dashboard was linked to internal data sources to ensure easy updates and accuracy. Initially designed for the segment demonstrating the highest need, the system was structured to be easily scalable to other segments, thus addressing the immediate issue while allowing for future enhancements and modifications. This dashboard included several performance indicators and graphs built with information that was already gathered, it merely organized the information and improved its presentation.

The dashboard enhanced accessibility and analytical speed, reducing manual workload, potential for error and enabling comparisons and predictions. This case illustrates how meaningful improvements can be achieved not necessarily through creating entirely new tools, but by leveraging and building upon existing resources in a structured and strategic way, it's the ability to keep building upon the previous improvements and systems.

4.2.2 Addressing Course Correction/Need for Adaptation Pain Points

A key inefficiency emerged in the way customer insights were collected during meetings. In an industry where direct customer feedback is often the most valuable source of intelligence, the existing meeting report system fell short. The existing meeting report system required sales representatives to submit unstructured reports, leading to inconsistencies and difficulties in retrieving relevant information. Reports were frequently unstructured, inconsistently filled, or completely neglected by sales representatives—many of whom doubted their usefulness with no indication that the reports were read or lacked guidance on what to include. The meeting reports system that had been developed still had useful sides, for example it was connected with the used CRM and specific reports could be filtered and searched for with ease. The meeting reports were important, they just weren't being used or useful. This represented a pain point that needed course correction, and adaptation. The solution was a revised meeting report system that was introduced, incorporating standardized

classifications of topics and subtopics, complete with examples to guide sales representatives in reporting pertinent insights (Figure 1 and Figure 2).

Customer/s	Market / Final Consumer	Competition	BA Glass Service	Operational Topics	Other Topics
Customer Capacities / Volume / Results	Consumption Trends	Competition in Relation to the Customer	BA in the Market and with Customers	Upcoming Meetings	Other Topics
Customer Investments	Average Market/Retail Prices	Competitor Production Characterization		Planning Changes	
Customer Products in Market		Competitor Portfolio			
Customer Business Trends		Competitor Investments			
Customer Contacts					
Market Dynamics / Market Characterization					

Figure 1: New Meeting Report Topic and Subtopics

Customer/s	Customer Capacities /	Customer Volumes Evolution Customer Performance Customer Market Performance Quantities Purchased Increases in Production of Customer Brands Customer Finances Customer Market Position Customer Forecast Customer Characterization
	Customer Investments	Customer Bets / Endeavours Customer Launches Customer Innovations Customer Growth Potential Customer Projects Customer Future Customer Growth Growth Plans Customer M&A Potential for Customer Growth Customer Policies Supplier Selection Criteria Customer Strategy Customer Business Plans
	Customer Products in Market	Type of Packaging Final Customer Product Details - Private Label Price Changes Quantity of Material Purchased by Customer Glass and Other Packaging Share Customer Preferred Packaging Type and Formats BA's Glass Share in the Customer Share of Each Packaging Material
	Customer Business Trends	Customer Challenges Mid to Long-Term Partnerships Customer Value Chain Pain Points BA Project Opportunities with Customer Partnerships Between Logistics Systems
	Customer Contacts	Possibility of Meetings with Someone Outside Procurement
Market / Final Consumer	Market Dynamics / Market Characterization	Market Value Most Used Colors by Country Most Consumed Capacity Mix by Country Market Evolution Market Drivers Market Trends Macroeconomic Market Trends - Inflation, GDP, etc. Events in Different Countries Subsegment Evolution Market Performance Market Share Evolution Packaging Trends
	Consumption Trends	Trend Explanations / Drivers Consumer Trends
	Average Market/Retail Prices	
Competition	Competition in Relation to the Customer	Competition Share in the Customer Who They Buy From and How Much Competitors Also Supplying Customers
	Competitor Production Characterization	Competitor Capacities Competitor Factory Details - Colors, Served Segments, Open and Closed Lines Competitor Locations Changes in Furnaces
	Competitor Portfolio	Competitor Products in the Market
	Competitor Investments	Competitor Bets
BA Glass Service	BA in the Market and with Customers	BA Evolution BA Market Share Evolution Feedback Price Feedback Customer Feedback BA Service Feedback Impact of Prices on the Customer
Operational Topics	Upcoming Meetings	
	Planning Changes	

Figure 2: New Topics and Subtopics with Examples of the type of information looked for

Business Unit Leaders could now filter reports based on these categories through the CRM system, streamlining access to relevant information. Furthermore, a feedback mechanism was implemented, enabling readers to notify report writers when their contributions were valuable, addressing concerns about report engagement and utilization. The development process also included consultations with multiple teams, uncovering further areas of concern and allowing the updated solution to be more robust, for example PDF files extracted from the meeting reports were refined for improved reading. This intervention exemplifies how adapting existing systems—rather than replacing them—can restore their intended function and improve both usability and data quality highlighting the constant need for improvement and revision of the marketing intelligence systems.

4.2.3 Addressing Improvement Opportunity Pain Points

Last but not least, a recurring manual task during the internship was collecting, categorizing, summarizing, and publishing industry news daily. While functional, this process was inefficient and time-consuming, limiting resources for other strategic initiatives. Therefore, this pain point represented an improvement opportunity to automate parts of the process. To optimize this workflow, an automation system was developed to scrape, categorize, and summarize industry news, distributing relevant updates to designated team members within each business segment, ensuring that the news got to the people that they affected the most first so that they could efficiently review before publishing them. In order to do this, a set of key words were collected, and a list of important websites was written. This solution scraped information from selected websites based on curated keywords, categorized the results, and summarized them for distribution to the relevant team members. This approach not only reduced manual workload but also enhanced accuracy and relevance.

The system's scalability also enabled its potential application in other departments, demonstrating its broader organizational value, in fact there was an interest in searching news important specifically for one department and this new automation allowed these news to be redirected only for the department that needed it. All in all, this solution was taking something that already belonged in the marketing intelligence apparatus further developing it and opening it up for future improvements. This solution demonstrates how relatively small process improvements can yield meaningful efficiency gains when applied thoughtfully.

Conclusion

The structured categorization of marketing intelligence challenges and the subsequent development of targeted solutions provided a clear pathway to improving the firm's strategic decision-making. In a B2B2C industry, where market conditions evolve rapidly, marketing intelligence must be continuously updated to remain relevant and actionable. The best way to strategize marketing intelligence in a B2B2C environment in order to find real time opportunities is to continuously improve and update the marketing intelligence apparatus in all of its misgivings be them small or big ensuring that the solutions address these issues but also leave room for further improvement. Marketing intelligence is not static and should be updated in order to continue to be useful, its faults must be addressed and the whole apparatus needs to be regularly checked. By systematically addressing gaps, refining existing processes, and proactively seeking optimization opportunities, marketing intelligence can become a dynamic and valuable tool. This internship provided an opportunity to assess existing limitations from a fresh perspective, engage with stakeholders, and implement meaningful improvements that enhance both efficiency and strategic insight. These improvements were helped by the categorization of the pain points into 3 categories that directed the analysis of the issues to the development of possible solutions, fast tracking the improvement of the marketing intelligence apparatus. Maintaining a continuously evolving marketing intelligence apparatus is essential to ensuring that businesses not only identify real-time opportunities but also capitalize on them effectively.

Ultimately, the research highlights the importance of maintaining a flexible, iterative mindset in the development of marketing intelligence. By continuously identifying shortcomings, proactively addressing inefficiencies, and embracing opportunities for optimization, firms can ensure that their marketing intelligence

remains a valuable and relevant asset. In doing so, they enhance their capacity for timely, data-driven decision-making and reinforce their strategic competitiveness in an increasingly complex market landscape.

While this research and the internship provided valuable insights into marketing intelligence challenges within a B2B2C context, several limitations must be acknowledged.

First and foremost, the scope of the internship was constrained by time. With only a few months available, the research and implementation of solutions had to be focused on the most immediate and identifiable pain points. While this allowed for targeted interventions and rapid prototyping, it limited the depth and breadth of analysis that could be conducted across the entire marketing intelligence apparatus. Longer-term projects, wider stakeholder engagement, and more complex system integration were outside the scope of what could be feasibly explored within the internship period.

Secondly, although the categorization of marketing intelligence pain points into three types—absence of something, need for course correction, and opportunity for improvement—proved to be a useful heuristic for identifying and addressing issues, this framework remains exploratory in nature. There is potential for further research to formalize and expand this categorization into a more structured decision-making framework. Such a framework could include criteria for assessing the severity of each type of pain point, tools for diagnosing issues, and guidelines for mapping categories directly to appropriate types of solutions. This would provide companies with a more systematic way of improving their marketing intelligence in real time.

Another notable limitation is the generalizability of the findings. The research was conducted within a single firm operating in a B2B2C industry, and while this model brings unique challenges—such as balancing indirect customer insights with direct buyer relationships—there was limited opportunity to deeply

compare or contrast these findings with B2B or B2C environments. As a result, some conclusions may not be entirely transferable to firms outside of the B2B2C model or even fully transferable to all B2B2C firms. Future research could benefit from a comparative study across different industry structures, helping to identify which pain points and solutions are universal and which are context dependent.

Finally, while the internship allowed for the development and implementation of specific solutions, their long-term impact could not be assessed within the project's timeframe. Further study is needed to evaluate the sustainability, scalability, and ongoing use of the solutions introduced, as well as their effect on decision-making quality and strategic agility.

In conclusion, this thesis lays the groundwork for a practical approach to diagnosing and solving marketing intelligence problems, but it also opens the door to several promising avenues for future research. Expanding the pain point classification into a more robust framework, exploring industry-specific nuances—particularly within B2B2C dynamics—and assessing the long-term performance of proposed solutions will all contribute to a deeper and more actionable understanding of marketing intelligence in complex business environments.

Declaration of generative AI and AI-assisted technologies in the writing process

During the preparation of my written work/thesis, Strategizing Marketing Intelligence and data to find real time opportunities in a B2B2C environment, ChatGPT was used for the following tasks: improving the researcher written text grammatically and polishing it in a more fitting academical style, with the prompt used listed at the end of the document in the Prompts List section. After using this tool/service, I reviewed and edited the content as necessary, and I take full responsibility for the content of the work presented.

I also declare that I am aware of and respect the Artificial Intelligence Rules of Conduct of Católica Porto Business School.

Prompts List section

“Improve the grammar of the thesis included in the attached document to better fit an academic research paper eliminating any error in both grammar and syntax”

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Appendices

Appendix 1 – Interview Script - English

Interview Script

Project Title: Strategizing Marketing Intelligence and data to find real time opportunities in a B2B2C environment

By continuing with this interview, you consent to the recording of it.

The main objectives of this interview are to understand the strategy decision making process; understand what each department needs to make decisions; get real examples of key information that has had an effect on the decision-making process; and comprehend how each segment functions as well as what they require.

General Questions

- 1 – Is there any information you wish not to be shared within an academic context (thesis and thesis presentation)?
- 2 – Could you introduce yourself and describe your current role?
- 3 – Could you briefly outline your professional background and experience?

Decision-Making Process

- 4 – Can you walk me through your department's decision-making process? What kinds of decisions do you make, and what data do you usually rely on? What critical decisions do you make on a regular basis pertaining market trends and evolution?
- 5 – What information is essential for you to make informed decisions in your role?
- 6 – How do you assess the quality of the information provided? What are the sources you use and trust most?
- 7 – What are the key metrics or reports you currently rely on? Could you provide examples of specific reports that have been particularly helpful in guiding decisions and what in them was useful?

Information Gaps and Reporting

- 8 – Are there any gaps in the information you currently have? What additional information or metrics would help you make better decisions?
- 9 – What information do you require with a set regularity/seasonality (example monthly reports) and what do you request on an as-needed basis?
- 10 – How frequently do you need updates or reports? Is the current reporting schedule adequate?
- 11 – In terms of regular reports and data what do you need and with what regularity?

12 – How would you evaluate the current structure of reports? Are they easy to use, interpret, timely, and informative?

13 – Do you see any opportunities to improve or automate the reporting process? What would make reports more actionable or dynamic?

14 – In your opinion, how could the reporting process be adapted to meet real-time decision-making needs better?

Segment Details and Cross-Departmental Insights

15 – How do the needs for decision-making information differ across the segments (or what is unique to your segment)? Are there any segment-specific factors that influence your department's strategy?

16 – What trends or shifts have you observed in the segments that have affected your decisions and decision making?

17 – What information from other departments would help you in making better decisions? How could the flow of information between departments be improved?

18 – Could you share examples where collaborative information or insights (cross-departmental) played a significant role in decision-making or helped in a meaningful way?

Customer and Consumer Insights

19 – What kind of customer (B2B not consumer) information has been useful/ are you looking for? What kind of data from customers might help?

20 – Similarly, what kind of final consumer information (B2B2C) has been useful/ are you looking for? What kind of data from the final consumer might help?

Inside Department

21 – What struggles do you face when developing a report?

22 – What information have you found to be the most critical and/or relevant when creating, analyzing and studying the reports?

23 – How do you track or monitor key players and competitors in the market? What information do you rely on for understanding market share and competitive movements?

Appendix 2 – Interview Script – Portuguese

Guião de Entrevista

Título do Projeto: Strategizing Marketing Intelligence and data to find real time opportunities in a B2B2C environment

Ao prosseguir com esta entrevista, consente a gravação da mesma.

Os principais objetivos desta entrevista são: entender o processo de tomada de decisão estratégica; perceber o que cada departamento necessita para tomar decisões; obter exemplos reais de informação chave que tenha impacto no processo de tomada de decisão; e compreender como cada segmento funciona, bem como as suas necessidades.

Perguntas Gerais

- 1 – Existe alguma informação que prefere que não seja partilhada num contexto académico (tese e/ou apresentação de tese)?
- 2 – Pode apresentar-se e descrever o seu cargo atual?
- 3 – Poderia dar-nos uma visão geral do seu percurso profissional e da sua experiência?

Processo de Tomada de Decisão

- 4 – Pode descrever o processo de tomada de decisão no seu departamento? Que tipos de decisões toma e em que dados normalmente se baseia? Quais são as decisões críticas que toma regularmente relativamente às tendências e evolução do mercado?
- 5 – Que informação é essencial para tomar decisões informadas no seu papel?
- 6 – Como avalia a qualidade da informação fornecida? Quais são as fontes que utiliza e que mais confia?
- 7 – Quais são as principais métricas ou relatórios nos quais se apoia atualmente? Pode fornecer exemplos de relatórios específicos que tenham sido particularmente úteis para orientar as suas decisões e o que neles foi útil?

Falhas de Informação e Relatórios

- 8 – Existem lacunas na informação que possui atualmente? Que informação ou métricas adicionais o ajudariam a tomar decisões mais assertivas?
- 9 – Que informação necessita com uma regularidade sazonal (por exemplo, relatórios mensais) e o que solicita apenas quando necessário?
- 10 – Com que frequência precisa de atualizações ou relatórios? A atual periodicidade dos relatórios é adequada?
- 11 – Em termos de relatórios e dados regulares, o que precisa e com que frequência?

12 – Como avalia a estrutura atual dos relatórios? São fáceis de utilizar, interpretar, relevantes e informativos?

13 – Vê oportunidades para melhorar ou automatizar o processo de elaboração de relatórios? O que tornaria os relatórios mais acionáveis ou dinâmicos?

14 – Na sua opinião, como poderia o processo de relatórios ser adaptado para melhor atender às necessidades de tomada de decisão em tempo real?

Detalhes dos Segmentos e Perspetivas Interdepartamentais

15 – Como diferem as necessidades de informação para tomada de decisão entre os segmentos (o que é único no seu segmento)? Existem fatores específicos do segmento que influenciam a estratégia do seu departamento?

16 – Que tendências ou mudanças observou em segmentos (seu ou outros) que influenciaram as suas decisões e o processo de tomada de decisão?

17 – Que informação de outros departamentos o ajudaria a tomar melhores decisões? Como poderia ser melhorado o fluxo de informação entre departamentos?

18 – Poderia partilhar exemplos onde informações ou insights colaborativos (interdepartamentais) desempenharam um papel significativo na tomada de decisões ou ajudaram de forma relevante?

Informações de Clientes e Consumidores

19 – Que tipo de informação sobre clientes (B2B, não consumidores) tem sido útil ou está à procura? Que tipo de dados de clientes poderiam ajudar?

20 – De forma semelhante, que tipo de informação sobre o consumidor final (B2B2C) tem sido útil ou está à procura? Que tipo de dados do consumidor final poderiam ajudar?

Dentro do Departamento

21 – Que dificuldades enfrenta ao desenvolver um relatório?

22 – Que informação tem considerado ser a mais crítica e/ou relevante ao criar, analisar e estudar os relatórios?

23 – Como acompanha ou monitoriza os principais intervenientes e concorrentes no mercado? Que informação utiliza para compreender a quota de mercado e os movimentos da concorrência?

Appendix 3 – Business Unit Leaders Interview Script

Interview Script

Project Title: Strategizing Marketing Intelligence and Data to Find Real-Time

Opportunities in a B2B2C Environment

By proceeding with this interview, you consent to its recording.

The project aims to explore the use of Marketing Intelligence in strategic decision-making within each segment, optimizing information flow and automating processes where possible. The interview seeks to:

- Understand strategic decision-making processes in each segment;
- Assess the impact and use of Marketing Intelligence in decision making;
- Gather real-life examples of key decision-driving information;
- Identify the Marketing Intelligence needs and nuances of each segment and what sets them apart from each other.

General Questions

1 – How does Marketing Intelligence influence your responsibilities and decision-making in your current role?

Decision-Making Process

2– How is Marketing Intelligence critical for informed decisions in your role??

3 – Which decisions rely on Marketing Intelligence? What specific Marketing Intelligence data or insights do you use and value most? Could you explain how you use Marketing Intelligence in decision-making and within your segment? In which decisions do you take into consideration market trends and evolution?

4 – Among the insights you get from Marketing Intelligence what data, metrics or reports are most crucial/useful? Can you provide examples of helpful reports and what made them useful?

5 – What sources of information do you rely on and trust the most?

6 – What is your process for strategy definition, and what Marketing Intelligence data do you prioritize?

Information Gaps and Reports

7 – What Marketing Intelligence do you need with a certain regularity/seasonally (e.g., monthly reports) and what information do you ask for only when needed?

8 – How regularly do you require updates or reports? Are the current reporting frequencies adequate?

9 – How do you prefer information to be presented (e.g., visuals like charts or detailed tables)?



10 – Do you see opportunities for report improvement or automation? What could make reports more actionable or dynamic?

Segment-Specific Details and Interdepartmental Insights

11 – How do decision-making information needs differ between segments? What's unique to your segment?

12 – Are there specific factors in your segment influencing strategy?

13 – Have you observed trends or changes in your or other segments that have impacted decision-making?

Customer, Consumer, and Competitor Insights

14 – What information about B2B clients, B2B2C end consumers, and competitors has been most useful? What additional data could help?

15 – To streamline client-related information gathering, what questions would you ask team members interacting with clients? What client or market information should be shared?

16 – Are there any details you would prefer not to be shared in an academic context (e.g., thesis or thesis presentation)?
