



EDITORIAL
MARKETING AUTOMATION,
AI AND ENTREPRENEURIAL HEURISTICS

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Abstract

Purpose. This editorial sets out some reflections and arguments on the impact of marketing automation (MA) on the role of entrepreneurial marketers and on the marketing content of the entrepreneurial roles in small firms.

Design/methodology/approach. The relevant literature covers the role of artificial intelligence (AI) in marketing, which we examine here specifically in relation to MA, understood not only in its more established sense of operational and routine activities, but also in those aspects of strategic marketing and decision-making that carry greater importance and added value. In addition to the literature, we draw on the findings of surveys and studies carried out with consultants specialising in MA and small businesses operating as international traders and in digital advertising.

Findings. The relationship between the use of AI in MA is integrated in hybrid forms with the role of the human element. Competences become fundamental – not only those to be acquired, but also those to be preserved in a context of integration with AI. The argument under discussion is that AI does not conflict with heuristic models of decision-making, but rather establishes a complex relationship with them – a relationship that can give rise to paradoxes and opportunities.

Practical and Social implications. The integration of MA is a topical business issue, with some companies – including small ones – embarking on significant exploration and learning initiatives, at least in certain sectors that are more exposed to technology and international markets. A key issue is that of the competences to be developed and maintained.

Originality of the study. The study is original in that it offers some previously unpublished reflections on the relationship between AI, MA and heuristic decision-making processes, putting forward a number of hypotheses which could be the subject of future research.

1. Introduction

The relationship between marketing and entrepreneurship has for many years been the subject of study from various perspectives: in marketing within small and medium-sized enterprises; in the relationship between marketing and innovation; and in the role of marketing within entrepreneurship. Today, the potential of artificial intelligence (AI) enables extensive automation processes in marketing. How does this automation impact the relationship between marketing and entrepreneurship, particularly on the decision-making processes of entrepreneurial marketers?

This is a very broad topic, and this editorial merely aims to offer some reflections based not only on the relevant literature but also on a number of recent projects we have carried out in collaboration with consultancy firms and small businesses that utilise forms of AI in their marketing processes, operating as intermediaries in international markets and as service providers for programmatic advertising.

AI is often introduced into companies through the adoption of software that uses various types of algorithms to execute, manage and optimise marketing workflows in real time (such as lead scoring, classification and dynamic content distribution) (Pamungkas, 2023; Guercini, 2022). Naturally, these specific systems – often introduced with the support of consultants and suppliers – complement the large language models (LLMs) widely used by the general public, highlighting a relative similarity between the position of business owners and that of consumers when faced with large platforms, a circumstance that has been noted for several years now (Kozinets and Gretzel, 2021; Puntoni et al., 2021).

By its very nature, marketing automation involves identifying antecedents according to a logic of ‘causation’ (Sarasvathy, 2001). It presupposes, in fact, that once a sufficient quantity of profile and behavioural data has been collected, customers’ judgements and choices can become predictable, enabling systems to achieve results through predetermined rules and linear pathways (Mero et al., 2020). Conversely, entrepreneurs operating in contexts characterised by high speed and a scarcity of historical data (such as early-stage start-ups) cannot rely sufficiently on historical data, as they are navigating largely uncharted territory. Instead, they tackle uncertainty by resorting to heuristics — cognitive shortcuts or ‘rules of thumb’ that enable rapid, adaptive and ecologically rational decision-making, based on limited data and simple processing models (Gigerenzer & Gaissmaier, 2011).

How does the introduction of marketing automation affect the entrepreneur’s heuristic-driven decision-making process? With regard to this question, our thesis is that marketing automation does not replace entrepreneurial heuristics, but rather requires new and different ones and /or alters their scope

of application (Guercini, 2023a), calling for a new form of alignment between decision-making and behavioural models and contextual conditions (Marewski et al., 2024).

Albeit briefly, let us examine the role of AI in marketing automation from various perspectives. Firstly, from the perspective of the potential offered by technologies (for example, in recent forms of agent-based AI). Secondly, from the perspective of the decision-making models of entrepreneurial marketers and the role of their personal skills and the competences incorporated or developed within the business organisation.

2. Marketing automation and AI

Long regarded as a process for replacing people in the performance of tasks with limited added value, such as sending emails and managing digital direct marketing (Little et al. 2001), marketing automation (MA) has recently come to take on a broader meaning, encompassing more strategic tasks. In particular, the theme of replacement has increasingly been complemented by that of integration and hybridisation between human and machine components, even in processes of higher added value and of a strategic nature, within a framework of 'conjoined agency' (Murray, Rhymer and Sirmon, 2021) and hybridisation (Guercini and Sestino, 2026).

Marketing automation predates artificial intelligence, given that the term first appeared in the literature between the two world wars to refer to the use of vending machines. Today, however, the term is linked to digitalisation and, even more so, to AI applications. Biegel (2009) cites the Winterberry Group's definition, according to which marketing automation can be defined as the use of marketing technology solutions to automate marketing processes, including (but not limited to) planning, budgeting, segmentation, database management, analysis, creative execution, resource management, campaign execution, lead management and reporting (Guercini, 2023b). These marketing technologies comprise a combination of software, networks and hardware that enable the input, processing and output of marketing and business information and content (Biegel, 2009, p. 2003). Since then, marketing automation has been conceptualised as closely linked to a category of software that optimises, automates and measures marketing activities and workflows to enable companies to improve their efficiency and increase revenue more rapidly (Miller, 2013).

In some respects, the use of AI involves a certain degree of replacement and/or integration of the human element, even in decision-making activities. Whilst marketing automation is often discussed in relation to operational activities, such as email management, customer interaction via telephone and online chat, and the integrated management of social me-

dia communication, automation has for some time now extended to strategic marketing functions such as classifying customers for the purposes of segmentation, targeting and positioning (Guercini, 2023a), as well as the management of creative content (Pagani and Wind, 2025). In summary, therefore, AI can extend the scope of MA to complex processes of a strategic nature. Although automation systems were conceivable even before this, it was in the early 2000s that we witnessed the creation and utilisation of systems to monitor the behaviour of internet users. It is in this context that marketing automation systems originated (Świeczak, 2013), capable of tracking the behaviour of email recipients on a specific website. The information obtained makes it possible to identify needs and provide a timely response with a level of personalisation that only automated systems are capable of managing.

More broadly, this concerns the integration of AI into business processes – not only in marketing, but also in specific contexts such as international-business, where the availability of data on linguistic and cultural contexts can, when combined with human expertise, support efforts to adapt the product or service offering, as well as the management of logistics systems and operations within an increasingly complex environment.

The focus on MA therefore sits within a broader context that presents clear opportunities and raises challenges within what has recently been termed the ‘ideology of automation’ (Fisher and Fleming, 2026). This term, distinct from ‘technological imagery’ (Kazansky and Milan, 2021) and ‘technological pre-framing’ (Razazade and Mehrizi, 2023), refers to those ‘managerial threats of future technological unemployment – whether realistic or not – that inform present power relations between workers and management’ (Fisher and Fleming, 2026, p. 714). This is a highly significant issue that arises at various operational levels, but it can certainly involve the executive level due to its potential importance in helping to shape the business model.

In this context, the issue of MA arises at the corporate level as a new area in which decisions must be made. On the other hand, AI is reshaping the very way in which decisions can be made. Automation therefore does not only affect low-value-added operational routines, but may also impact more important, high-value-added processes that require a new form of integration with the human element. MA therefore addresses strategic issues such as customer classification based on segmentation, targeting and positioning; recommendation systems; and programmatic or real-time advertising (Guercini, 2023b).

Experience with small businesses suggests that the advance of new forms of AI has varied effects. The experience of many of us who are involved not only in academia but also in working with businesses on research or consultancy projects shows that, despite the documented backwardness

of some parts of the business world, in other cases small businesses can be surprisingly quick to experiment with and adopt certain solutions, especially if these are available at low cost or can be put to immediate use to support decision-making processes. As previously noted (Guercini, 2022), the adoption of automated, digitalised systems alters the decision-maker's 'operating environment'. This interaction does not diminish the value of heuristics; on the contrary, it turns them into a breeding ground for innovation by reconfiguring their scope — that is, the boundary conditions within which a heuristic rule can be successfully applied (Marewski et al., 2024).

An automation system cannot construct its own conceptual framework autonomously. Before a marketing automation (MA) tool can assign a score to a lead or trigger an email sequence, the entrepreneur must set the initial parameters. In the context of a start-up, where historical consumer data is scarce, these parameters are based on heuristic beliefs (for example, *"If a customer requests a demo within 24 hours of visiting our pricing page, they are a highly intent buyer"*).

This is a classic application of the recognition heuristic or the intelligent cue heuristic (Gigerenzer, 2022). The decision-maker – typically the entrepreneur in a small business – draws on their tacit knowledge of the sector to construct decision-making and behavioural models. In an MA context, this could involve transforming subjective intuition into codified algorithmic logic. MA goes beyond an intelligent CRM to influence the very orientation of marketing itself, in which the technological dimension is not merely a supporting element, but a reality whose characteristics can mediate and shape a certain type of relationship between the business and the market within a context of digitalisation (Brock and Von Wangenheim, 2019).

3. AI and entrepreneurial heuristics

AI supports MA by enhancing the capacity to collect and process data for the formulation of judgements and choices, thereby supporting the marketing decision-making process of human actors, potentially either by integrating with or replacing it during an automation phase. In this context, decisions that were already more data-driven in the past are the prime candidates for becoming automated decisions (Bucklin, Lehmann and Little, 1998). MA derives its rationale from certain characteristics of particular interest to business management. Specifically, MA: (1) can offer efficiency gains, managing marketing processes more effectively whilst saving time and costs; (2) can enable decisions based on models capable of providing better forecasts than those made by managers, thanks to the ability to utilise a broader database with more powerful data acquisition and processing capabilities; and (3) offers the capacity to deliver decisions in real time (Morgan et al., 2022).

As is well known, particularly—though not exclusively—in small businesses, the marketing aspect of the entrepreneurial role encompasses the formation and application of market knowledge and its contribution, for example, to the generation of innovation. In this context, the role of intuition has always been emphasised, as have heuristic decision-making models, based on the use of limited data and simple processing procedures. Whilst there is a debate, particularly within psychology, as to whether these models involve systematic errors in the form of bias or whether they can be ‘fast, frugal and smart’, all parties to the debate agree on their widespread use and adoption by human decision-makers, to the extent that some authors refer to heuristics as ‘natural’ decision-making (Klein, 1998), or identify biases in the application of judgemental heuristics as a form of cognition typical of ‘humans’ (Thaler and Sunstein, 2008).

As demonstrated by Mero et al. (2020), entrepreneurs do not always adopt AI for MA by following a rigid, causal master plan. On the contrary, they often experiment with the software using a ‘trial and error’ approach (employing the *tolerable loss* heuristic), discovering the technology’s unexpected potential as they interact with it. For example, before making a decision, those using forms of generative AI may find it acts as a sort of interlocutor to consult or from whom to obtain assistance, both in guiding them towards knowledge-based activities and in formulating draft plans to be reviewed with the appropriate expertise, subsequently adopting, integrating or correcting them.

It can be assumed that in all sectors where decisions must be based on the use of data, and where the greater the need to process large amounts of data in a short time, the greater the potential role of AI in forms of MA. When decisions cannot be based solely on data, the human decision-maker can continue to play an important role, fuelling an emerging dichotomy between more or less pronounced forms of automation in marketing processes (Van Bruggen and Wierenga, 2010).

Given the growing capacity of machines to process data, it is conceivable that all decisions intended to be data-driven over time may be supported, if not taken exclusively, by machines and AI. This raises a number of questions: what role remains for the human decision-maker? What form will human intervention in these processes take? The human decision-maker will likely be concerned, rather than with decisions based on information, with monitoring outcomes and the empirical rules to be followed, in the light of which to evaluate processes and decide when to ‘disengage’ the ‘autopilot’. To this end, our argument in this article is that the ‘heuristic decision-making process’ should take on greater significance, in particular by enhancing those decision-making modes that characterise human decision-makers and which are fundamentally defined as ‘fast thinking’ by Kahneman – that is, heuristics, considered an element capable of making

decision-makers intelligent (Gigerenzer, 2022).

Indeed, heuristics are defined here as algorithms that can be easily applied by human actors in terms of simplicity, robustness and transparency (Katsikopoulos et al., 2020). Automation is already, today, and will become even more so in the future, of such importance that it represents a key differentiating factor within marketing practice and research. This is occurring whilst other traditional differentiating factors tend to be less relevant. For example, today the same platforms (such as AdWords) are used by both consumer and business buyers, leading to a convergence of certain aspects of the purchasing process. Many companies in business-to-business markets are now also entering the consumer market via these platforms, often with their own online shop, leading to an integration of business and consumer marketing expertise. In discussing these aspects, an emerging distinction is proposed regarding the degree of ‘automation’ present in the relationships between market players, which can be very high or lower, relying on AI and big data, or on personal interaction and heuristics. These two components can be integrated in different ways, with implications for the evolution of marketing professionals.

The idea of a trade-off between automation and personal interaction – whereby a higher degree of ‘automation’ can be achieved through the use of AI and big data, or a lower degree through personal interaction and heuristics – may prove to be incomplete and misleading. These two components can be integrated in different ways, certainly giving rise to potential paradoxes but also opportunities, with significant implications for marketing practitioners. For example, our recent collaboration with a consultancy firm specialising in MA revealed the widespread adoption of forms of AI in decision-making processes, not only as a source of data but also as a source of proposals or as an ‘advisor’ to obtain opinions and elements of support or criticism regarding potential judgements and choices.

The survey also revealed that companies’ approaches to adopting AI for MA processes – and in particular for marketing decision-making – varied considerably. Alongside companies that are more culturally behind, many firms are in fact making extensive use of AI tools. In some cases, adoption may be surprisingly advanced, indicating the presence of small companies utilising various combinations of large language models (LLMs) and AI agents to carry out operations, particularly in the areas of international market analysis, training and the management of communication processes. In this context, our survey—conducted in collaboration with specialist consultants—reveals that the use of AI tends to be underreported compared to its actual usage in practice (Guercini, Milanese and Sorrentino, 2026).

These differences in approach also lead to a reconfiguration of competitive processes, which have always viewed technological evolution as a powerful driver of change. The replacement of tasks carried out by hu-

mans with automated marketing processes is taking up an increasing share of traditional marketing activities, whether in the areas of research, strategy or the marketing activities themselves (Huang and Rust, 2021). This is particularly, though not exclusively, the case in 'algorithm-based' business models, where the use of automation linked to big data and artificial intelligence is having an increasingly evident impact on marketing literature (Huang and Rust, 2021).

The relationships between stakeholders, based on processes that are potentially becoming increasingly automated and on the use of big data and automation, are leading to the adoption of similar practices that are ever more advanced and adapted to a marketing context that is potentially automatable. Indeed, on the one hand, the full potential of automation lies precisely in the management of larger volumes of data, which require a growing effort in terms of processing capacity. On the other hand, the future trend towards the commoditisation of decision-making processes based on the use of big data is linked to an increase in the value of decisions which, for the time being, are not automated. The activities that will remain the preserve of humans could retain greater added value. The competences that remain the preserve of humans also suggest that relationships will continue to be based on interaction between human actors and the use of simplified (heuristic) decision-making rules, as delegating these to machines is not considered effective. More generally, the issue of competences in the context of MA processes appears particularly important, both in terms of developing new competences and in recognising the impact of these new competences on existing ones, which in some cases may also prove significant for the future (Guercini and Lechner, 2023)

In addition to the functional level, MA also affects the decisions that the entrepreneur must make regarding the market and the market knowledge they acquire, which, as we have said, defines entrepreneurial marketing as a key aspect of the top-level management role. This type of role has traditionally relied on intuitive decision-making and gut feeling, with heuristics applied in conditions of uncertainty (Guercini, 2012), alongside networks of personal contacts (Carson, 1985). Various models of automation can therefore be identified (Guercini, 2023b). The choice of how to position one's organisation in terms of the role to be assigned to AI in decision-making processes, within a set of possible process models, is a significant choice that may affect the entrepreneurial role itself. At the same time, it is the entrepreneur themselves who uses, or may use, AI to develop their market knowledge and as a process to support their own decisions.

4. Some conclusions

The argument we put forward, based on the above considerations, is that automation in marketing does not mean that entrepreneurial marketers will move beyond the use of heuristic decision-making; rather, it presents a new challenge for the adaptive toolbox, as it is managed by adapting the heuristics used and their scope of application.

A number of anecdotes from the business world highlight hypotheses and possible avenues for discussion and future research. One of these concerns the relationship between data and decisions, which appears to be reversed. Whilst traditionally we have data on which decisions are based, here a situation seems to emerge in which the use of systems requires the adoption of decisions on which the data depends – data which should then form the basis for subsequent decisions. In this decision-data-decision chain, the role of heuristics may change whilst remaining fundamental.

As we mentioned earlier, some of the literature provides evidence that entrepreneurs, when introducing AI to manage the marketing content aspect of their role, do not follow a rigid, causal master plan. On the contrary, they often experiment with the software using a ‘trial and error’ approach (employing the *tolerable loss* heuristic), discovering the technology’s unexpected potential as they interact with it. In a book published a few years ago, Gigerenzer (2022) highlighted how the widespread perception of AI tended to obscure the characteristics of human intelligence compared to algorithms, and how certain simple models of decision-making and behaviour were fundamental in relation to big data-based artificial intelligence. This offers a perspective that emphasises the role of human input in future MA processes in relation to the application of entrepreneurship.

In summary, the relationship between marketing automation and entrepreneurial decision-making represents an important area for future research for those involved in marketing and entrepreneurship. Research into the adoption of AI in MA within small businesses can make a significant contribution, no less important than the study of the technology’s potential for the future of our economic system – starting at the local level and extending to influence the economic and social landscape as a whole. In particular, the ability of small businesses to respond positively to these changes can have important implications for their competitiveness and for the quality of the economic system in which they operate.

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