

# **HOW CRM- SYSTEM AFFECT PERFOR- MANCE OF B2B SALES STAFF OF ENTER- PRISE X**

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## 1 ABSTRACT

The impact of CRM on organizational performance has been widely researched within various contexts and industries. Such researches have aimed at finding out a truth concerning connection of such multiple organizational metrics as efficiency, received amount of customer complaints, level of satisfaction, customer loyalty, perceived value, with power of CRM (Yaghoubi, Asgari, Javadi; 2017). However, there have been only fewer number of researches targeting to identify clear connection between especially performance of sales staff and presence of CRM- system. As sales is considered to be one of the most important functions in any organization with its ability to generate cash flows, it is natural to investigate ways to improve its efficiency. Additionally, there are barely organizations without CRM nowadays and, according to author's perceptions, CRM and sales usually go hand in hand. Rodriguez and Honeycutt (2011) have also found out that there exists a strong and obvious link between performance of sales and utilization of CRM within organization. Therefore, one can conclude that those two are tightly related to each other.

As there are typically people in charge of carrying out sales tasks, it is sensible to make an assumption that CRM affects sales staff and their performance. But in what kind of way? In this research the main target is to identify impact of CRM- systems on performance of sales staff such account managers, sales trainees and senior sales professionals. The subject was shed light on in previous researches of Rodriguez and Honeycutt (2011) as well as in one by Rodriguez and Yim (2015), but this particular one will provide readers with more details by moving deeper from abstract level to slicing a typical sales process into 5 stages. Impact of CRM on each stage's staff performance will be examined through conducting series of interviews with sales staff of each stage. The aim of this research is to collect sales staff- based experiences and generate insights on impact of CRM on staff of each of 5 stages of sales process. The described sales process originates from Enterprise X, a firm where the author has been working for certain amount of time. The research will, therefore, introduce a case study of impact of CRM on sales process staff within one pre- selected enterprise.

The best way to gather answers was to select such persons for interviews who were in charge of different tasks within sales pipeline: Sales Assistants, Account Managers and Team Managers. Those people had the best insights available on CRM's and sale functions' collaboration as their daily jobs included dealing with both. The most of them were author's teammates and colleagues and this impacted choice too: easily approachable and experienced sales professionals have been chosen to fuel the research with relevant data.

All the persons asked for interviews accepted the call and interview questions, so this didn't require deeper moderation. More of this will be discussed in Chapter 5.

## 2 INTRODUCTION

### 2.1 Background

CRM as a definition has been around for a while. The very first CRM- systems were introduced in 1970s and were primarily used for converting manual files into digital form in order to save space in storage (comparecamp.com, 2015). With time, they evolved into agile and flexible cloud solutions that are mainly to be implemented to support marketing and sales efforts of organizations, especially on strategic level (viennaadvantage.com, 2016). According to the definition of CRM at Investopedia (2017), CRM, or, customer relationship management, stands for principles, guidelines and instructions to enable organization's interactions with its customers. Salesforce.com (2013) adds a dimension of data and information associated with those interactions. Generally speaking, CRM- system can be typically described as a system that stores data about customer interactions with a given organization and that enables management of those interactions within the organization.

Sales has also been widely researched as one of the most important functions within any company, because of its ability to generate money and cornerstone- like character. The role of sales within any enterprise has gone through radical changes: from being only one business function among many others, sales turned into organization- wide, strategic, cross- functional process (Storbacka and others, 2009). Not only changing as a concept, sales went through technological changes, too. For example, sales was affected by CRM- systems in many different senses: according to the research of Chen and Popovich (2003), CRM integrates sales along with other functions in order to form a touchpoint between organization and its customers, aiming to ease customer interaction information management. Jayashree and Shojaee (2011), in turn, have found out that CRM increases sales and improves customer service. Those findings reveal that connection between usage of CRM and sales performance actually exists. Because majority of organizations strive to improve their sales and truly many of them use CRM daily, it is rewarding to research CRM's impact on sales performance as CRM already exists and simply requires deep insights on its impact on sales in order to achieve enhancement in sales metrics.

Because there are barely sales without involvement of people, significance of people within sales process is obvious. Impact of CRM on sales staff's performance has been widely researched by Rodriguez and Honeycutt (2011) as well as by Sheykhlar and Keshvari (2015). However, according to author's perceptions, sales people shouldn't be viewed as homogenic mass. Instead, they are responsible for many tasks: ones prospect

new potential customers, others book meetings for the next ones, account managers meet customers and key account managers maintain customerships. Of course, there are no salespersons whose job responsibilities are limited to only single tasks, but X's staff can be rather characterized as multispecialists. All those people carry out different jobs with their own distinctive style and their connection with CRM is not the same for all the mentioned groups and, therefore, requires individual approach in research. Account Manager A prefers to prospect from Vainu and Account Manager B does this with help of Cbook. B also handles industrial customers, who prefer to read emails before the call and A calls straight to his business prospects. Both use Cbook differently: A analyzes his statistics in Cbook, B prefers Excel for the same purpose, but follows his teammates' performance on Cbook. This is the major difference between this and previous research projects: in this research the aim is to observe impact of CRM on performance of different representatives of sales staff.

## 2.2 Research questions and limitations

The connection between usage of CRM and performance of sales staff on task area level has never been explored in deep details. Therefore, the purpose of the research will be linked to gaining comprehensive insights about impacts of usage of CRM- based system solutions in sales. As the main interest point of research is to identify relation of sales staff performance and usage of CRM, the main research question comes as following:

- How does CRM- systems affect the performance of B2B sales staff in different stages of the sales process?

As intention of this research is to also offer potential significant practical value to decision makers, it makes sense to include more detailed questions to be answered. As around 65% of organizations strive to improve and develop their sales functions, especially one's productivity (Seismic.com 2015), researching impact of CRM- systems on peoples performance within designated sales process area will help to find out a lot of room for improvements. Naturally, secondary research questions can be formed as following:

- In which phase of sales process do CRM- systems have the most impact on sales staff performance?
- What are the most important features of CRM- systems in different sales process stages?

The aim of this research is to provide readers with deep insights on the subject and the suggested topic without forgetting to stay focused on connection between sales process



and CRM- systems. As this kind of approach requires a focused and unambiguous view on sales process model as well as certain amount of real-life observations and sufficient practical expertise, the research process has the following limitations:

- The impact of CRM- systems is only limited to sales staff
- The sales staff and sales process originate from only one certain pre-defined enterprise, Firm X
- No other staff members are included into research.

### **2.3 Goals and structure of research**

The aim of this research is to provide readers with constructive view on impact of CRM- systems on performance of B2B sales professionals working within sales process of the Enterprise X. The purpose is to extract sales individuals' own perceptions and opinions regarding usage of CRM- systems within their specific area of work. Then, the extracted data will be drawn conclusions from.

The research doesn't try to generalize findings to fit reality of all firms possible as it is, it rather pursues a goal of generating deep insights on phenomena within one selected enterprise. The findings of the research can afterwards be applied by other firms with customized and necessary modifications. A target group of this research is meant to consist of B2B sales professionals, all the persons to deal with sales process and its development. Generally speaking, the research tries to reach all the involved sales individuals in order to provide them with valuable findings of possible improvements within collaboration of CRM and sales process. The interest this research aims to provoke, strives to make all the people involved in B2B sales process benchmark the existing state of their sales organizations against the one of the research, in terms of existing link between CRM and performance of sales staff, and to design possible improvements based on the findings.

The structure of the research comes as following:

- Part 1: Abstract. This part summarizes the goal and means of this research
- Part 2: Introduction. This part provides readers with backgrounds, research questions, goals and limitations as well as with the structure and the method of research
- Part 3: Theoretical background and previous researches. This part contains theoretical background of main concepts as CRM and sales and sheds light on previous researches regarding relationship between CRM and performance of sales

- Part 4: Sales process in the Enterprise X. This part describes sales staff in terms of tasks and measurement of performance and sales process of Enterprise X and its stages
- Part 4: Materials and results. This part contains interview question as well as data and results drawn out of it.
- Part 5: Conclusions. This part contains conclusions and summary of research results as well as answers to the primary and secondary research questions.

### **3 THEORETICAL BACKGROUND AND PREVIOUS RESEARCHES**

In this section the main concepts of the research will be presented. First, a concept of CRM will be presented. Then, a concept of sales staff will be handled and after we will deal with different metrics of sales staff performance measurement. Finally, it is purpose to shed some light on the previous researches on impact of CRM on sales staff performance to distinct differences between this and previous researches.

The intention of this section is to get readers familiarized with key definitions and results of the previous researches to be well equipped with necessary knowledge, which will help them to understand the next sections.

#### **3.1 CRM**

We start with defining concept of CRM. According to Investopedia.com (2017), CRM, or, customer relationship management, can be seen as set of principles, guidelines and practices for a company or any organization to organize a contact with its customers and to follow company-customer interactions. Businessdictionary.com (2017) offers even two different definitions of the same issue: the first one sees CRM as a way for a company to achieve its goals through identifying and fulfilling customers' known and unknown needs; the second one claims CRM to be a computerized system for generating and finding out the best mix of customers. A view of Parvatiyar and Sheth (2001) handles CRM as a mechanism for a company to focus on building productive and two-sided relationship with its clients and customers. Chen and Popovich (2003) see CRM as a mixture of technological achievements, people and business processes that strives to get a picture of firm's customers. Dutu and Halmajan (2010) offer marketing-oriented view: CRM is a system, whose goal is to enhance marketing process outcomes and this is achieved by improving marketing process's efficiency and effectiveness. Generally speaking, CRM refers to a system, often computer-based one, that has capabilities to fulfill management's needs for managing customer relationships. CRM stores customer data as customer information and interactions and provides management with full-scale view on company-customer relationship.

CRM has gone through several changes since its first introduction in 1980s. Back then, the concept of database marketing has risen and companies started to take serious steps towards gathering information about their clients and arranging it in more or less structured way. In 1990s, companies faced the fact that true value of CRM cannot be realized by simply storing and holding data in databases. Instead, they started to interact with

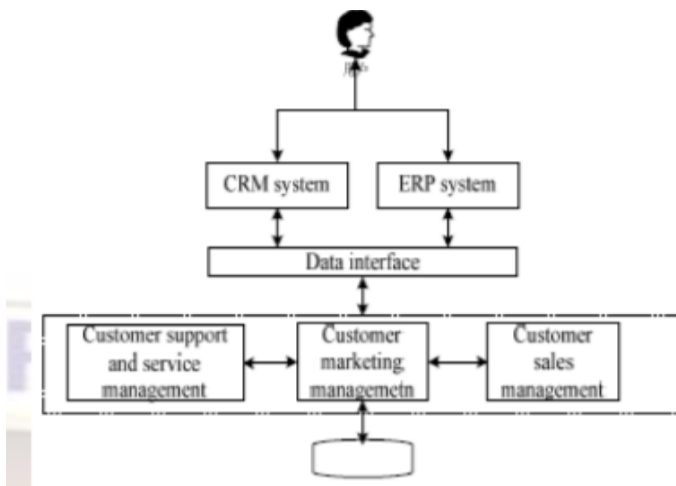
customers based on data they got. For instance, sending free gifts and various perks to customers paved a way for a modern purpose of CRM: to lead building of two-sided customer relationships and to keep track of customer- company interactions. (Roberts 2004.) From 2000s to nowadays, trend of CRM development has been quite straight: to move from computer-based to cloud- based platform and to implement the central portal to manage all business relationships within companies (crmswitch.com, 2013).

It seems that CRM- systems followed the path of many technological achievements of nowadays: they moved from enterprise-centric to customer-focused view with implementation of fascinated technological solutions. Wells et al. (1999) supports this customer-centric claim by summarizing overall philosophic approach of CRM: IT- based solutions (CRM in this case) enable organizations to enjoy successful development by letting them concentrate on getting and keeping up customer share instead of market share. Because advanced technology plays quite a big role in CRM, It is also justified to review logic behind creation and implementation of CRM- system within organizations. In order to understand how CRM- systems gain playground in firms and provide them with advantage, a research of Bose (2002) proposes eight stages of technology- based CRM development process:

- Planning stage: a firm has to decide, where, when and how their customer interaction will take place. Senior- level management must commit to CRM and define, for example, how information will be used by managers of different organizational levels. For instance, it must be planned if a supplier interacts with its customers face-to-face, on phone, with e-mail or web page. Also, how will the management take benefits off the customer interaction information in their decision making?
- Research stage: IT- team of the organization must recognize methods to fulfill firm's needs within framework of CRM. Factors like vendors, firm's structure, hardware and software etc. must be carefully assessed.
- System analysis and conceptual design stage: in this phase it makes sense to consider if interaction between CRM and customers must be IT- assisted or IT- automated. In the first case, CRM acts more as a supporting tool for employee and in the latter one a customer controls the whole interaction without intervention from employee's side. In this stage firms also need to assess if they should join forces with outside consultants to gain expertise and establish a staging project. It is also vital to decide if customer data has to be re-designed in terms of its storage, because it would assist in implementing CRM across the organization.

- Design stage: When project's viability is ensured, it is time to create specification of required software, data warehouses, decision support systems, architecture of network etc.
- Construction stage: it is quite a large part of CRM project and it involves execution of design stage as all the technologies are going to be implemented in this phase. As in the stage three, firms must assess if they need help of outside experts in order to get the project done.
- Implementation stage: this phase involves establishing full understanding of new technical and business processes through extensive training of users. CRM means enhanced gathering of data. However, this data has to be analyzed and interpreted and that is why users must be trained to become fluent in both usage of CRM and in analyzing information to assist in decision-making.
- Maintenance and documentation stage: As every company should strive to learn more about its customers, it makes sense to continuously evaluate of performance of the system, for instance, in terms of data quantity and quality. IT-team must work in close collaboration with other departments to find out if specifications of implemented system are sufficient to meet requirements.
- Adaptation stage: as a firm acquires more information about its clients with CRM, it tends to change. Nowadays, new channels for sales may mean new communication points or new types of data that needs to be collected. If a firm doesn't adjust its practices in terms of usage of IT (CRM), it fails to retain its customer-centric focus and therefore, its competitive advantage.

As described in stage of implementation, customer data must be analyzed and interpreted and that is why advanced techniques like data mining should be taken into consideration to get the most out of data. Data mining refers to processes, whose goal is to turn data into information. The aim is to find patterns and relationships in big masses of data and, therefore, data mining is extremely useful for adjusting firm's offers to customers' preferences. (Investopedia 2017.) Sundari and Padmapriya (2012) described structure of a CRM-system from point of view of data mining in the graph below.

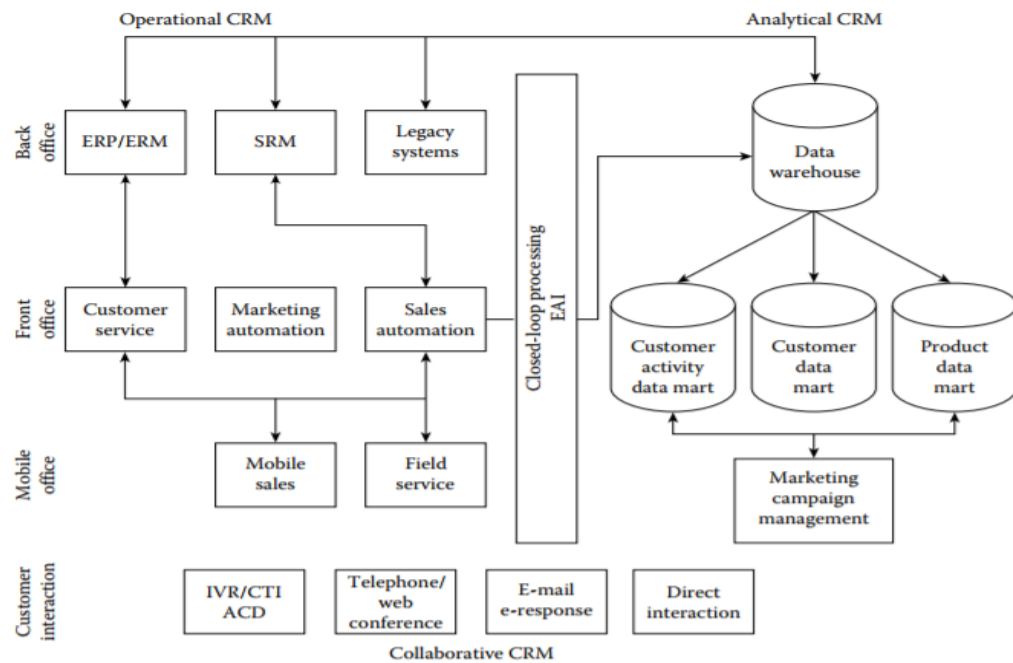


Graph 1 CRM from point of view of data mining

As one can see, the CRM- system of the graph consists of three layers with different tasks. Interface level provides users with easy access to information and interacts with them, functional level consists of subsystems and forms operational layer with number of operations. Finally, support layer holds operational and database systems within. (Sundari and Padmapriya 2012.) However, there are more than one type of CRM- systems and Kale (2015) defines three types of CRMs:

- Operational CRM: systems of this type assist sales staff in becoming better target achievers and increasing their productivity. These CRM- systems provide users with extensive support for processes faced at customers that are typically done with phone, e-mail, webpages or third parties. Operational CRM-systems mainly have data of transactional level within, for instance, customer or product data.
- Analytical CRM: these systems help to craft customized marketing campaigns. Major data of these CRMs is aggregated data consisting of product groups, key customers, market segments and campaigns as units of analysis, for instance. Planning processes of strategic nature are supported by analytical customer relationship management systems.
- Collaboration CRM: systems of this type help to establish fluent interaction with clients and to ease collaboration and communication between employees, customers and partners. (Kale (2015).)

Structure of three types of CRM- systems as well as their relationships are depicted in the graph below.



Graph 2 Structure and relationships of CRM- systems (Kale 2015)

What benefits do CRM- systems possess, then? Multiple researches have tried to find an answer to this question. Among the others, Mithas, Krishnan and Fornell (2006) have researched CRM's benefits. These identified benefits can be approached from the following points of view:

- A firm is able to gain broader knowledge on customers' preferences and to adapt its offer according to those preferences
- Company can reinforce its customer knowledge with CRM and can serve its customers' needs in better way. This is especially affected by deep supply chain integration level within the company
- CRM enables firms to customize their offering, to enhance their customers' consumption experiences and to manage customer relationships in more efficient way.

Other benefits of CRM come as following:

- CRM generates affective commitment, that helps companies to hold customers
- CRM improves customer satisfaction, which also has positive impact on customer retention rates
- CRM positively affects customer share development. (Verhoef 2003.)
- Enhanced efficiency, improved collaboration between parties and increased accountability are consequences of CRM usage

- CRM gathers data, which helps companies to understand their companies better. Additionally, CRM has positive impact on customer experience. (Robles 2015.)

In the next chapter such specifics of sales staff will be discussed as definitions, concept, roles and responsibilities to give a broad view of human element of the research.

### 3.2 Sales staff

Different persons have heterogenic perceptions considering sales staff. For some people sales people mean ones standing in the middle of a square, with aim to get rid of outdated goods. For others, sales staff refers to sales professionals striving to resolve their clients' challenges by applying their expertise and using consultative approaches. Some consider sales persons to be some kind of middlemen and connecting elements between customers and manufacturers to keep both goods and cash flows happen. For the purpose of this research exact and standardized definitions have to be provided. Thefreedictionary.com (2017) defines sales staff to be those who are responsible for sales function in business. On individual level, Businessdictionary.com (2017) offers the following definition for salesperson: a person, who sells products and services to other persons and entities. When considering main purposes of sales staff, Pearson (2017) provides us with typical description of sales staff job role: sales staff are those who change state of customers from potential to actual. Members of sales staff identify potential customers and communicate company's products and services to them in order to generate cash flows. Generally speaking, sales staff means a team or department of persons, whose task is to sell firm's products or services to potential customers, to give a birth to actual customerships and to maintain these company- customer- relationships.

Why is sales staff so interesting for this research? Hawkins (2016) admits that sales is still the most important function of every business. Storbacka and others (2009) see sales as a strategic, cross- functional function within any company. That is definitely true: sales is the only function that generates cash flows and brings money to a company. Without sales there would barely be any business and that is why sales should be paid enough attention in order to ensure company's success. Because of sales' role as business accelerator and a prominent element of business organizations, sales people or, sales staff, can be considered to be the most important parts of personnel. Everything these people do affect cash flows of organizations and one of these things is usage of CRM- systems to control customer relationships.



To completely understand concept of sales staff, it makes sense to divide them into categories according to their job tasks and responsibilities. According to author's experiences, salespersons rarely represent homogenic employee mass with identical tasks. Instead, they all act in different positions within a sales process pipeline that will be described in details in chapter 4. One encounter customers only on paper, the others meet them and another fraction coordinates both. Moncrief and Marshall (2005) propose seven steps of sales process:

- **Prospecting** – in this stage potential customers are mapped and identified. Contact lists are being formed and prepared for the next step
- **Preapproach** means doing background research by getting information about customer and using arguments to schedule a meeting, for instance
- **Approach** holds all the tactics and strategies to get an initial contact with a customer. For example, having small-talk with customer makes actual sales presentation easier to conduct
- During **presentation** a salesperson understands needs of his/her customer and presents a possible solution
- **Dealing with objections** means defeating customer's doubts related to salesperson's firm and products. A salesman must deploy solid counterarguments to get a customer onto his side
- **Close** means successful completion of sales efforts and gaining customer's full commitment to deal with the provider of services or products
- **Follow-up** stage supposes that the salesperson must ensure customer's satisfaction with purchased product or service and monitor customership, because there might hide additional sales opportunities.

As one can see, the sales process is quite a complex entity and in real life not all of sales people handle all the stages alone. In his blog Metler (2017) lists different types of sales roles: inside- and outside sales, sales support and client services, lead generation, business development and account management. In another blog issue of him, Metler (2017) explains meaning different sales job positions and the findings appear to have connection with sales process theory of Moncrief and Marshall stated above to some extent:

- Outside sales persons: those start the sales process with searching potential customers and contacting them through cold calling, e-mailing and one of their goals is, in fact, to propose a meeting.
- Inside sales persons take care of existing customers and their task is to keep customerships up by addressing customers' needs
- Leads developers can be compared to outside sales persons, but their role is more limited as they deal more with generating leads by researching and interacting with people they know

- Closers are often senior sales persons like account managers, who have enough expertise to close deals
- Client service specialists are responsible for providing customers with information and answers after sales already happened and they play big role in maintaining customer relationships
- Territorial sales persons might combine all the previously mentioned tasks in their role, but they are often assigned to work on certain, for instance, geographical territory
- Sales assistants can be defined as junior sales profiles who support more senior sales persons in their administrative routines and daily office tasks. Their duties often include preparation of presentations, sales notes, conducting competitor and cost analysis.

As work of sales staff is highly measured, it makes sense to introduce typical measurement methods in the next chapter to give a picture about reward model of sales staff.

### **3.3 Performance of sales staff**

As sales is a business function which generates value with numbers of occurred sales transactions, it is extremely important to measure efficiency of selected sales measures being in use. In sales it is usual to implement a number of KPI:s as using only one is typically not enough to monitor sales performance in holistic way.

First of all, it is prominent to define performance as variety of its definitions is quite broad. For instance, for some people performance means degree of getting to the finish line, for others performance stands for state of current activities, which can be bad, intermediate or excellent. The Cambridge Dictionary (2018) provides us with a definition, according to which performance means how well machine or person does its work. Another definition by Businessdictionary.com (2018): *“The accomplishment of a given task measured against preset known standards of accuracy, completeness, cost, and speed”*. To create universal definition for performance, it is justified to state that performance arises when task with pre-defined goals/standards is complete and all the requirements are met. Thus, performance can be characterized as fulfillment of agreed measures with usage of standards/metrics. In case of sales staff performance, it means how well sales persons accomplish their job against pre-defined indicators and their performance has correlation with received rewards as bonuses and salary.

How performance of sales staff can be measured, then? And what kind of standards are available to be compared against? Unfortunately, there are only few researches to have gathered sales performance indicators under the same roof, but it seems that sales KPI:s (key performance indicators) were an interesting subject for Peterson (2018), who recognized open quotes and quotes per month/week to be important measurement units in terms of measuring sales success. When we recall types of sales persons mentioned by Metler (2017), some job-typical metrics can be connected to various sales positions:

- Outside sales persons (can be also called bookers and prospecters): appointed meetings, number of calls, opportunities created, number of emails, number of demos
- Inside sales persons: number of closed deals, opportunities by stage, calls, meetings and ROI meetings etc.
- Lead developers: average lead response time, distribution of qualified/dropped leads, customer acquisition cost, frequency of new leads added to sales pipeline etc.
- Closers (can also be called account executives): number of deals closed. (Frost 2017.)

Martin (2013) expands the list by adding extra metrics: average annual quota, average new deal size and field sales revenue trends for outside sales persons, average annual quota and SMB (small business) specialization for inside sales persons. Martin also proposes common sales metrics for all types of sales staff: quota attainment average, average annual on target earnings sales cycle length and sales preparedness. Without doubt, we can conclude that sales is extremely result-oriented business function and as we get closer to reviewing previous researches considering CRM's role in sales staff performance, it looks clear that sales staff needs significant technological solutions to get more efficient in fast- evolving business market.

### **3.4 Previous researches on impact of CRM on sales staff performance**

The research topic doesn't seem to be unique as both CRM and sales are already mature phenomena and so is their relationship. It is generally known that technologies have come to stay and purpose of inventing them has always been to ease certain activities and to make people more productive as well as job tasks more comfortable. CRM- systems are not an exception: the concept has been introduced to take customer relationship under control and to ensure that a company gets to know its customers better in order to form closer ties to them. So, CRM- systems can be considered to be supporting "columns" of

relationships with customers and, on the other hand, sales is a tool to form these relationships. Without doubts, CRM- systems affect performance of sales professionals and previous researches considering the topic were found to act as predecessors of the current research.

One of the previous researches was conducted by Rodriguez and Honeycutt in 2011. Purpose of their paper was to assess relationship of CRM and sales performance, but the authors used different approach to topic: they exploited internal and external collaboration as key component for defending CRM's benefits for sales staff and didn't break sales process into parts. Instead, the authors aimed to explore CRM's impacts on general level of sales process without going into the sales process itself. Not only that, but also sales performance is presented as something else than single entity: performance while working with customers and effectiveness of sales process as whole. Also, another major difference compared to the current research can be identified: the approach of Rodriguez and Honeycutt is quantitative with usage of survey as main research method. Altogether 4 hypothesis were developed and accepted after tests: "*Utilization of CRM leads to increased performance with customers/Utilization of CRM leads to increased sales process effectiveness/Utilization of CRM increases the ability to collaborate internally with peers and management/Collaboration positively mediates increased performance with customers*". (Rodriguez & Honeycutt 2011.) As we can see, CRM- systems improve customer communication and lead to greater efficiency in both sales process and customer work. Other outcomes of CRM utilization were also identified: ability to provide higher service level, to customize solutions, to generate higher customer value, to greatly increase coordination, to improve KPIs like closing rates and to generate higher revenue and many others. However, none of those benefits generated by CRM were tied to certain sales process parts and that is why is remained unclear, in exactly what phase of the sales process does CRM have the greatest value. Therefore, only general value propositions were extracted, but no detailed benefits per process stage.

Another research we have come across was conducted by Ahearne, Hughes and Schillewaert in 2007. In this paper, focus lies more on sales person's acceptance of CRM technology and willingness to adapt it in one's everyday sales tasks. According to the authors, the technology itself is not critical, but its usage by sales reps is prominent in order to ensure firm's success. As it was already mentioned in the beginning of this pro gradu, only few researches considering connection of CRM and sales performance have been conducted yet and also Ahearne et al. (2007) agree with that by stating, that previous researches either lack solid evidences and don't provide enough empirical data or are based on people's personal perceptions. The authors still agree that role of CRM as prominent business development tool still leaves no doubts and sales persons with CRM can

achieve much better results than ones without. The following effects of IT- based CRM were discovered:

- Better general productivity
- Improved customer communication
- Increased targeting abilities
- Productivity of calls
- Improved access to information and management of customer data
- Enhanced problem- solving etc.

The authors presented three hypotheses (*“IT acceptance has a positive effect on salesperson performance/ IT acceptance has a positive effect on salesperson call productivity, which in turn positively influences salesperson performance/IT acceptance has a positive effect on salesperson targeting and sales presentation skills (which are both mediated by knowledge), which in turn positively influences salesperson performance”*), all of them were accepted after analyzing the results. We can clearly identify impacts/benefits of IT-based CRM as part of sales rep’s daily work, but once again, impacts of CRM have been connected to general usage and acceptance of CRM by sales person instead of breaking the whole sales process down to single parts and connecting the revealed benefits to these parts. This is the most obvious difference compared to this pro gradu.

In turn, a paper by Rodriguez, Ajjan and Peterson (2014) approaches the topic not directly via CRM- systems, but via customer orientation instead. According to their theory, CRM- solutions may affect customer orientation that impacts sales performance, in turn. It is explained in the study that customer- oriented processes help to understand technology's impact on performance, especially the one of sales. This research appears to be the most customer- oriented of all the papers that were examined and can be agreed with: without customers there would hardly be any technologies involved, because any CRM- system is designed to support sales person's efforts in customer relationship management process instead of replacing them. In many cases, firms already manage to create customer relationships before implementing any CRM- based solutions. The research also adds social media dimension next to CRM, but as social media aspect is located outside of current scope, it wasn't reviewed any further. Two direct CRM- related hypotheses have been presented and tested: *“CRM has a positive relationship on customer-orientation/ Customer oriented processes has a positive relationship on sales performance”*. (Rodriguez, Ajjan and Peterson 2014.) Among others, the following benefits of CRM implementation were revealed:

- General improvement of customer data
- Improvement of customer relationship
- Enabled process of value co-creation

- Support of customer orientation and helping a company to understand its customers better
- Faster sales cycles
- Improved customer satisfaction through creation of personalized offers
- Enhanced to respond to customers' demand etc.

Still, the article doesn't provide answers regarding role of CRM in sales performance within different sales process parts and only focuses on general impacts. Therefore, it doesn't provide an answer to our main research question.

A study by Becker, Greve and Albers (2009) appears to be the closest one in terms of scope: the authors have reviewed impact of CRM implementation on customer acquisition, maintenance and retention. They concentrated more on technological and organizational aspects of CRM implementation in their paper and clear link to our research can be identified: customer acquisition, maintenance and retention are actually equivalents of the parts of the sales process presented in this pro gradu. Acquisition (getting new customers) is umbrella- term combining prospecting, booking and meetings. Maintenance and retention both count for development of customership as they both involve keeping customers satisfied and up to date as well a fulfilling contract obligations. This research also explains that implementation of CRM is not only about completing installation of software and configuration of systems, but it is also about user engagement and acceptance as well as adaptation of organizational processes and mindsets. Thus, the authors propose that both, technological and organizational dimensions, are crucial and the following hypotheses were set and approved: *“There is a positive relationship between technological implementations and performance of acquisition, maintenance and retention (AMR)/ The stronger is management's support for CRM, the higher will be the impact of organizational implementations on AMR performance/ The greater the employees' support and acceptance for technological systems is, the stronger will be the impact of technological implementations on AMR performance”*. (Becker, Greve and Albers 2009.) The following effects of CRM on AMR performance have been identified:

- Improved rate of freshly acquired and lost customers
- Improved customer satisfaction, revenue/customer and enhanced cross-up selling
- Reduction of customer churn and improved customer retention

However, the study has one serious limit: it defines CRM's impacts on too general level (“CRM improves customer acquisition, but how?”), without going into more precise details. For example, how reduction of customer churn is achieved by using CRM? Generally speaking, the study focused more on stating that both organizational and technological implementations actually have positive impact on AMR performance, but left a lot to be discussed yet regarding concrete and detailed AMR metrics affected by CRM in

each sales process stage, because the effects of CRM on AMR performance listed above are not enough for gaining deep insights on the subject.

Ahearne, Jones, Rapp and Mathieu (2008) have approached similar topic in their own research, but their study is not only about CRM: it also regards salesforce automation software as part of influencer toolkit. However, as their approach was IT- centric and any CRM- system is actually IT- enabled mechanism by its nature, the study can be considered as relevant. The authors have built a model, which represents IT (CRM) influence on salesperson characteristics, behaviors and performance via usage of technology. According to the model, CRM improves quality of customer service perceived, attention to personal details, extends knowledge of a salesperson, improves his/her adaptability to different situations, makes call activity more productive and enhances salesperson's experience, leading to better results in the future, from sales call to another. In this study CRM was introduced as a tool that enables prediction of sales outcomes by helping salesperson to adapt his/her strategy according to past experiences, either own or someone's else. Like in the research by Becker and others (2009), also in this study we can detect links to the sales process of Enterprise X, although not fully covered: sales calls count for booking, face-to-face sales count for meetings and providing customer service as well as repeating sales count for development of customership. Ahearne and others (2008) claim that IT- solutions don't impact performance directly, but rather via meditating mechanisms like customer satisfaction and increased knowledge of salesperson. The authors set and defended the following hypotheses: *“Higher IT (CRM) usage by salespeople is connected to better salesperson performance/ Higher IT (CRM) usage by salespeople is associated with higher perceptions of customer service as perceived by the customer/ Higher IT usage by salespeople is associated with higher perceptions of salesperson market and product knowledge as determined by the customer/ Higher IT usage by salespeople is associated with higher perceptions of adaptive selling as determined by the salesperson/ Higher perceptions of a salesperson's customer service are associated with higher salesperson performance/ Higher perceptions of a salesperson's attention to personal details are associated with higher salesperson performance/ Higher salesperson adaptability is associated with higher salesperson performance”*. The following benefits of CRM were presented:

- More detailed and high-quality information becomes available independently from location
- Better customer service can be provided
- Salesperson's knowledge gets better and broader
- Makes sales calls easier and more professional, helps to win customer's trust
- Enables quick and adaptive analyzing and behavior
- Improves customer- salesperson interaction

- Makes it possible to adapt offers and to offer customized services according to customer's preferences.

However, the study has the same problem as the previous ones: it seems to move on more general level without digging into details as according to purpose of the pro gradu. It also lacks desired process orientation (it doesn't handle the sales process as set of steps, rather as "faceless" entity") and not that many sales metrics were encountered during the review. There is no clear connection of different sales process stages, metrics and CRM's impact and this is why this study couldn't provide us with the answers we are looking for.

Numbers of relevant researches seem to be quite limited and none of them have provided us with direct answer to our main research questions. The main limitations are lack of sales process orientation, too high level of abstraction, inability to cover the sales process from beginning to end point, absence of technological descriptions of CRM- systems and, of course, lack of sales KPIs. Many gaps have been left unfilled: impact of CRM- systems in different sales process stages remained relatively unknown and relations of KPIs, metrics and CRM- driven effects haven't been defined clearly enough. At that point it looks like only distantly similar researches were conducted and this is why the topic of this pro gradu is fully relevant for development of CRM- salesperson relationship.



## 4 SALES PROCESS IN THE ENTERPRISE X

### 4.1 Introduction to Enterprise X

In this section Enterprise X is going to be introduced. Its name should not confuse readers – this firm is real, but because of business secrets, its management gave permission to conduct case research only with retention of anonymousness. For purpose of the research it was agreed that the name Enterprise X is going to be sufficient, because emphasis of the research is going to focus more on its internal processes than outer shell. It was also agreed that real name of X's CRM- system will be classified and expressed with CRM-name. All the other elements like technical features, functions and parameters will be used and described as they are in reality.

Enterprise X has rich past and promising future. It was founded in Sweden in 1990s and its main business idea was (and is) to provide firms with recruiting and staffing services. The special focus lies in supply of high-educated workforce, so called “white collars”, although company's scope is getting broader. The company is active in multiple European countries and has far-lying plans to expand its existing market borders to Russia, Baltic countries and China. Enterprise X has hundreds of employees and consultants and is constantly looking forward to lure more personnel to cover its needs to develop the business. As growth rate of revenue is around 30-50% annually, it seems to be justified to commit as much as about half of the revenue to growth and development. An aim of the company is to take its place among the best 10 staffing and recruiting agencies in Finland, but also to win annual award of being the best place to work.

Enterprise X has multisided business portfolio with services as main offers. The portfolio holds the following assortment of core offerings:

- Recruiting services: X receives an assignment from a customer company to find, sort, interview and select candidates to present and to hire suitable ones straight to the customer company. X receives nonrecurring compensation for the completed operation and provides the customer company with guarantee: if the candidate quits job within certain amount of time, replacing recruitment will be executed without extra fees
- Staffing services: X hires candidates, but they work in customer companies as consultants. This service possesses extended flexibility for customer companies as they can hire employees to cover occasional needs like projects. Customer companies pay compensation to Enterprise X as big as consultant's salary + staffing service fee. In this case, Enterprise X carries the risk of employer.

- Talent training: X trains whole classes of students to prepare them to work for customer firms in different and pre-defined tasks. For instance, training students in classes of Business Intelligence and Data Analytics has reached growing popularity among firms suffering from shortage of skilled employees. Options are either to order an individual or a class of 10-15 persons.
- Corporate brand services: X provides services to improve corporate brand image in eyes of both customers and potential talents looking for a reliable and solid companies to become their employees. The service includes polishing company's presence in social media, stakeholder relationship management, marketing campaigns etc.
- Education services: X trains personnel of customer companies in actual themes like project management, balance of private and work life, sales, marketing, development and implementation of campaigns etc. Either individual or serial sessions are available and content of training is designed together with customer companies.

One of distinctive features of Enterprise X is that it hasn't outsourced any business functions, but prefers to produce everything by itself. The company contains the departments described in the list below:

- Executive board: this department consists of CEO, Head of Sales, Head of Operations, Head of Marketing, Head of Finances and Head of People. Main tasks of the board are to define strategic directions of the enterprise, to develop work methods and staff management, to supervise implementation of strategy on operative level and to lead departments towards the common goal and mission. The board also represents Enterprise X toward other stakeholders (shareholders, investors, media etc.)
- Sales department: led by Head of Sales, the main goal of this department is to generate cash flows to run the business. Consisting of dozens of Account Managers and Sales Assistants, the sales department is the largest entity in the Enterprise X in terms of size and significance. The tasks of the department are prospecting of potential customers, booking appointments, presenting solutions and closing deals by receiving customers' orders. The sales department is divided into dozen of sales team, each of them is led by Team Manager and consisting of five Account Managers and one Sales Assistant. This department is the main source of company's growth, which reaches 30-50% every year and there are no signs of decrease
- Recruitment department: led by Head of Operations, the heart of the department lies within recruitment team, consisting of dozens of Consultant Managers and just as many Recruitment Assistants, whose main task is to find suitable

candidates for customer companies. Typically, this department fulfills orders considering recruiting, staffing and talent training issues. Recruitment is carried out not only for external, but also for internal purposes. For instance, Recruitment Assistants may hire Consultant Managers for needs of Enterprise X.

- Marketing department: marketing campaigns, stakeholder group communications and employee relationships belong to core duties of this department. Those people represent Enterprise X in different kinds of events, for instance, job fairs, business festivals and customer events. The marketing department also plans and executes advertising campaigns according to firm's strategy.
- General development department: led by Head of People, this department plays support role. Its main duties are to monitor well-being of the staff members, to conduct staff surveys and to ensure general satisfactory considering tasks, work environment and staff development guidelines
- Finance department: this department takes care of financial processes and accounting of the enterprise. It includes around 5 accountants, 2 Finance Analysts and the department is led by Head of Finances
- IT- department: the department ensures that IT-systems are running and always up to date. They are also responsible for IT- training and IT- purchases of the company. This is the only entity without leader and is governed jointly by the executive board.

So far, it looks obvious that Enterprise X houses many departments with different tasks under its roof and prefers not to outsource any of its functions. However, the most significant cornerstone of the enterprise is sales department, because thanks to its efforts, the enterprise acquires a lot of new customers every single day. As the sales department uses the CRM- system to most extent and offers a lot of room for researching sales staff performance, it is important to understand principles of sales department- CRM- relationship before answering research questions. In the following two sections both elements of this relationship will be reviewed in more details: both sales staff and the CRM- system of the enterprise.

## **4.2 Sales staff and tasks**

As already mentioned, Enterprise X is a home for sales staff of many kinds. As its sales department is the biggest internal organization in both terms of influence and size and

number and sorts of employees, the sales organization of the company can be characterized as quite a heterogenic entity. In whole, the sales organization has clearly defined hierarchy led by Head of Sales. This follows a thought impressed by Singh (2013) considering defining nature of sales organization: according to him, sales organization can be described as a framework with structure, defining and distributing rights and responsibilities among its members. Selling objectives are set in such framework and measures are defined that are needed to achieve the sales goals.

In the sales organization of Enterprise X there exist five different types of sales staff positions and some subtypes of those mentioned:

- **Head of Sales (HOS):** this person can be considered to be the main sales person in the whole Enterprise X. He or she has enough power to define strategic sales guidelines, to assign the most significant accounts to chosen Account Managers, to take care of collaboration between international divisions of Enterprise X. Head of Sales belongs to the executive board and is responsible for sales development of the whole organization. One of HOS's core tasks is to ensure fulfillment of X's sales goals with optimal allocation of resources, for instance, hiring decisions of the sales department rise mainly after HOS has analyzed the current situation and made decision to expand X's sales personnel base. Head of Sales also defines distribution of responsibilities among various offices of the company. Head of Sales is the most significant user of CRM of the company as he crunches huge amounts of customer and sales performance data
- **Branch Manager (BM):** these people are responsible for leading company's offices in different locations. Branch Managers are sparred by Head of Sales in management and they help him/her with planning activities of offices. BM organize sales in their own region and define local sales metrics to better adapt to local market environment. They are given relative freedom to make their own management choices considering assigning new Team Managers and Senior Account Managers. They are also in charge for establishing local sales teams and they report directly to Head of Sales. BMs use CRM on daily basis, mainly for analyzing sales metrics of their offices
- **Team Manager (TM):** TM are leaders of sales teams consisting of Senior Account Managers, Account Managers and Sales Assistants. Their major responsibility is to follow guidelines defined by Branch Managers and Head of Sales and to make their team reach the goals set. There are in charge for training their team members, for developing their team as a whole and for taking care of team members' work wellbeing. Typically, Team Managers share similar tasks with Account Managers and also have personal sales goals, so managing a sales team is only a part of their job. TMs work with CRM to monitor their teams'

statistics and make use of numbers to improve their teams' operational efficiency by training their team members in booking, making calls, prospecting and closing

- Account Manager (AM): can be characterized as “work horse” of the sales department. AM acts as a main work unit in sales and they form a backbone of Enterprise X as their main responsibility is to carry out the sales process as a whole. They begin the sales process by prospecting potential customers, calling them and appointing a meeting. Then they meet customers and close deals as well as explore opportunities to develop their sales accounts. There also exist two subtypes of Account Managers: Senior Account Managers (SAM) and Key Account Managers (KAM). SAM are selected from the most successful AMs and they have a special privilege of developing company's customers with greatest revenue. KAMs take care of company's ten most significant customers and they have own sales teams consisting of SAMs. KAMs and SAMs enjoy the greatest sales numbers in the whole company as their customers are developed to extreme extent and they can concentrate purely on maintaining existing customer relationships instead of prospecting and meeting new ones
- Sales Assistant (SA): former Account Manager Trainee, SA is a general name for entry- level sales positions in Enterprise X. Sales Assistants work in part-time mode and their major duties mainly have supporting character: their tasks include prospecting, booking meetings for Account Managers and everyday's office tasks like sending e-mails, customer communications per phone and taking care of preparing necessary sales documents like offers and agreements. Sales Assistants also attend co-visits together with experienced Account Managers to gain experience for the future. Majority of Sales Assistants become Account Managers after they graduate and are able to work in full- time mode.

As one can see, the sales organization of Enterprise X has enabled it to allocate sales tasks in clear and efficient way as the company's growth has been astounding from year to another. There is a clear hierarchy of duties and all the tasks are assigned to employees in accordance to their skill level. Because one of the main strategic goals defined by X is to develop its sales staff in terms of both professional growth and work wellbeing, some other additional positions were established to support fulfillment of firm's strategy. The following positions can be assigned to either TM, AM or BM and choice of candidates depends on their skills, sales performance and maturity:

- Booking coach (BC): the best booker of Enterprise X has a chance to be selected as Booking coach. According to its name, BK trains AMs and SAs in booking by helping them to develop cold calling scripts and call structure to achieve better

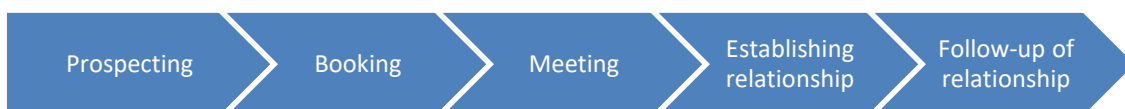
booking performance. This means getting more appointments and improving calls/appointments ratio

- Sales coach (SC): the most productive Senior Account Manager of Enterprise X can become Sales Coach to share his knowledge and expertise with others. Typically, this position involves modelling sales meetings and developing closing and negotiation skills of regular Account Managers

As we have seen, the sales organization of Enterprise X is multisided and doesn't only consist of purely functional roles, but also contains positions concentrating on "mental training" of the sales staff. As department's members have tasks located around different phases of generic sales process, it is going to be introduced in the section below. Stages of the sales process are going to be discussed in details.

### 4.3 Sales process stages

In designing the sales process, Enterprise X focused on increased efficiency and decreased complexity. As one can see, the sales process is far from complicated as it contains five stages that will be discussed in details later in this chapter. It starts with identifying potential customers and ends with developing existing relationships with customers.



Graph 3 Sales process in Enterprise X

All of the process stages don't belong to strict sales staff groups, but rather are completed by majority. This means that, for instance, Account Managers and Team Managers cover all of the stages. However, there exists a basic principle: the more experience a sales person has, the more demanding customers are assigned to him/her. More seasoned employees manage portfolios mainly consisting of existing customerships and fraction of prospecting becomes relative small compared to all the others duties in their task collection. For instance, daily time of Account Manager is distributed in the following way: 20% go to prospecting, 20% go to booking, 30% are consumed by meeting new customers, 20% of time are used in making offers/sending agreements and the rest of 10% is used for developing customer relationships and exploring opportunities for additional

sales. On the other hand, time of more experienced Team Manager is used in slightly different way: 10% go to prospecting, 10% are consumed for booking, 10% are used for meeting new clients, about the same amount is used for negotiating agreements with new customers and the majority of 60% is taken use of in developing already existing customer-erships.

To understand impact of single process steps on cash flow of the company, the steps must be reviewed in more details and step-by-step.

### ***4.3.1 Prospecting***

Businessdictionary.com (2018) refers to prospecting as a systematical way to collect names (leads) of potential customers. In other words, prospecting is about gathering potential names into list in order to contact them and to establish the very beginning of sales process. Names can be gathered from various sources: CRM, e-mails, personal relationships and networks, rumors and Web sites. Virtually names can be collected from anywhere. In Enterprise X prospecting is paid special attention to, because it can be characterized as the most significant stage of the whole sales process. Why so? Without names, leads and other useful “intelligence” elements there wouldn’t be any sales transactions, because identifying and knowing potential customers gives a solid base for future refinement of customer mass.

In Enterprise X, many different ways to prospect are taken benefit of. There is absence of fully automated prospecting process, so the most stages have to be executed manually. A typical prospecting process follows the workflow described below:

- Finding potential customers: the most arduous stage is to find good sources of potential customer names. In Enterprise X, the best sources for finding prospects are proven to be Vainu.io and Finder, but also X’s own CRM system. Vainu.io serves mainly needs for so called analytical prospecting, which stands for finding prospects with certain characteristics like revenue, gross profit per month/year, growth rate, financial development trend etc. Finder by Fonecta is used to accompany Vainu’s functionality, because Finder holds a way more names and telephone numbers compared to Vainu. However, Finder only contains names, addresses and telephone numbers, but rarely information considering economical state of a company. CRM of Enterprise X is used as the easiest way to find prospects as it contains unoccupied and previously created prospects, often providing sales staff with an opportunity to contact already warm

“leads”. CRM mainly holds such prospects within that were unassigned because of different reasons: they didn’t need any services, their financial state didn’t enable them to purchase anything at given point of time, they were unsatisfied with Enterprise X’s services. Basically, these unassigned prospects were held in CRM just to be prospected again a bit later and majority of them were contacted at least once.

### 4.3.2 *Booking*

Even if a company has strong prospecting and powerful tools for finding new names, without booking there wouldn’t be any sales. Why so? Booking is a vital stage, because its purpose is to connect provider and customer in live mode. According to Oxforddictionaries.com (2018), booking means a process of reserving something like accommodation, service, room etc. For the goals of this research, definition by Businessdictionary (2018) will be more relevant. According to this definition, booking stands for arrangement of meeting of client and potential supplier of either goods or services or both. A purpose of booking is to get customer to devote a certain amount of his/her time to meet a supplier/sales person and to get familiar with potential solution presented by the latter.

In Enterprise X, booking is not only the most prominent cornerstone of every sales operation, but it also acts as one of many KPIs for Account Managers, Sales Assistants and Team Managers. Every day sales staff of the company make hundreds of calls in order to fill their calendars with meetings to convert them into sales opportunities afterwards. Booking follows clearly defined process:

- Name picking: first of all, it is vital to always have fresh-made calling lists on the desk, because efficient booking requires immediately having everything on hand
- A call: in case of so called “cold calls”, a booker contacts a completely new customer without previous knowledge of his/her business, and tries to book a certain time slot to meet the customer. In case of Sales Assistants, they book meetings for more experienced Account and Team Managers instead of booking for themselves. Cold booking is considered to be the most complex sales task in Enterprise X, because contacted customers are typically represented by business managers and executives, whose schedules are always full and don’t allow to meet multiple sales representatives. With “warm” leads (already buying customers and contacted ones), it is much easier to book a meeting because they are already familiar with X’s concept and a goal of such meetings is mainly to update current situation and offer additional services rather than to



achieve first sale. Raising customer's curiosity and persuading him/her to book a sales meeting require continuous maintenance and improvements of sales staff booking skills with help of Booking Coaches, but also good tools to support the booking process. These tools are the CRM-system and comfortable headphones to ensure high technical quality of a call

- Post-call actions: these actions aim to ensure that agreed meeting is going to happen and that a booker has enough knowledge before meeting the customer. A booker sends a calendar invitation to a contacted customer and awaits acceptance of the invitation. He or she also starts to prepare a presentation and to investigate nature and needs of potential customer's business to be discussed about.

In Enterprise X, special attention is paid to quality of booking instead of achieved amount. If a customer only accepts a meeting to get rid of a caller, such "meetings" are likely to be aborted afterwards. That is why it is important not only to get e-mail of a customer to send the calendar invitation and to embellish own booking statistics, but rather to make customers understand a point of meeting and to fortify significance of meeting X's representative in their eyes.

### 4.3.3 *Meeting*

Booking leads to meeting that is crucial step for the sales process. Its significance evolves from the fact that in this stage a customer sees a sales person for the first time face-to-face. Meetings creates a base for establishing potential customership, because during interaction between parties it becomes obvious whether Enterprise X can fulfill needs of a customer in professional way and for reasonable price or not. Meeting also acts in opposite way: a customer is being analyzed by Account or Team Manager and it is decided whether to start collaboration with him/her or not. Factors for choosing a customer are his/her financial stability, number and variety of needs. Also nature of assignments is an important element to be taken into account: if a customer asks to find a person to hire with rare set of skills and, especially, to do that in short period of time and for low price, this combination can become unbearable from point of view of X's business profitability.

In Enterprise X, meetings serve a double purpose: they both generate extra sales from existing accounts but also establish new customerships. Typically, there exist two kinds of meetings: physical and virtual. Physical take place either at customer's location or in HQ of Enterprise X. Virtual meetings are conducted via Skype or phone, but, generally speaking, only physical (face-to-face) meetings are considered to be a powerful tool to

accelerate company's sales. For this reason, only amount and outcomes of face-to-face meetings are measured as KPIs, virtual meetings are only taken as extra bonus.

Every meeting follows pre-defined structure that is pretty generic. It follows the following pattern: introduction of both companies, general discussion about customer's business and recognition of needs. It is relative rare to sign a contract immediately after the meeting in case of meeting a new-acquired customer, because a customer still needs to compare various alternatives and weight benefits against expenses. A meeting is a perfect opportunity for a sales person to discover new leads, because typically a customer knows someone else with similar needs. In case of successful meeting, a contract is being prepared to be signed by next time and even if the meeting doesn't generate sales immediately, it produces valuable data to fortify X's knowledge about labor market trends and current situation. In theory, every customer can be turned into paying customer, but this requires certain amount of time and effort to happen. That is why careful analysis of meeting outcomes is done afterwards and a customer is classified whether as "hot" or "on hold". Generally speaking, the meeting stage helps the sales staff of X to concentrate on profitable customers and stop the process in case of "on hold"- clients.

#### **4.3.4 *Establishing customership***

For the next stage, a customer is considered to be promising or not, according to notes made during the meeting. If a customer is worth investing time and resources and interests of both customer and X's meet each other, it is time to establish a customership or to generate extra sales if account already exists. In both cases, the approach varies slightly in terms of process and length. In case of establishing a new customership, there exist the following steps that are highly standardized:

- A customer is checked for credit information. This means that if a customer has had payment troubles in past, his or her payment terms are stricter. For instance, for customers with payment troubles only immediate payments and payments in advance are available. If a customer had had frequent problems with payments invoices, rejection of such customer is likely to happen
- A type of contract is selected. As majority of X's sales originates from staffing and recruiting services, either of two contract templates is typically picked. As templates are standardized, the only elements to be changed according to nature of order are information about a customer, amount to be paid for service and deadline of completion of order
- Terms of contracts are reviewed together with a customer

- A plan and schedule for completing the assignment are presented to customer and approved by both parties
- The contract is signed and Enterprise X starts the process of getting the order done.

When the contract is signed, a status of customer is changed in the CRM- system and a new customership is officially established. If an account already exists, the process only consists of simplified steps: selection of service type, presentation of completion plan and signing the contract.

#### **4.3.5 *Developing a customership***

Majority of Enterprise X's customers purchase services more than once, especially when it comes to staffing and recruiting services. This is caused by variety of reasons: customer's business has grown and new needs have arisen, X's services helped customer to boost its business or, alternatively, a hired person quitted and a customer is looking for replacement. Whatever might be the reason for extra purchases, but in Enterprise X special attention is paid to developing existing customerships. Myler (2016) supports this strategy, because getting customers is important, but keeping them is significant from point of view of continuous and profitable growth. This makes sense also with demonstration of real-life example: what is cheaper, building an apartment or just maintaining the existing one with proper care?

Existing customers are considered to belong to dream-portfolio of every Account Manager because of various reasons:

- Typically, existing customers don't reject call efforts of Account Managers and it is much easier to book a meeting with them
- Existing customers are conscious about X's services so time can be allocated straight to making extra sales instead of educating customers by sending them materials regarding X's services. On average, it takes around two or three meetings to get a first order by a new customer
- Acquisition cost of existing customers counts to zero
- Existing customers are a great source of new leads

Typically, existing customers are contacted on regular basis defined by each Account Manager. Sometimes, Account Managers delegate the responsibility to Sales Assistants, who can book a meeting and prepare contracts to save AM's time. In Enterprise X, developing existing customerships means proactive approach instead of reactive. That means that although existing customers call to dedicated Account Managers by themselves to tell about new needs, it is AM's duty to contact existing customers on regular

basis in order to demonstrate that they are taken care of. This proactive approach also carries practical purpose: often even existing customers are not aware of their potential human resources needs and must be spurred by Account Managers. For instance, one of existing customers opened a new office and hired an Office Manager by X. However, the new office didn't produce desired output and at the same time the customer received a call from X's Account Manager regarding meeting and update of current situation. Together they realized that X could help the customer by hiring an Assistant for the Office Manager, because the latter one was heavily overburdened by his current tasks. A new position was established and a person was hired with help of X. Additionally, X received a 1- year contract by the same customer as a recognition for its help.

The stage of developing existing customerships closes the sales process. In this chapter, only process stages became described, but there is a vitally important supporting system in the background: CRM – system of Enterprise X. Without the system there would hardly be any long-lasting customer relationships because of missing coherence and systematic approach to customer care. In X, both sales staff and CRM need each other and should be paid equal attention to. In the following section, the CRM of X will be reviewed, especially from point of view of the sales process. Such questions will be handled:

- How is CRM taken benefit of in every sales process stage?
- What kind of KPIs exist to measure sales staff performance and how does CRM contribute to measurement of these KPIs?

First, the CRM- system will be described as a whole, including its architecture and features. Second, connection between CRM and parts of the sales process will be introduced. Finally, KPIs of the sales staff will be discussed and purpose is to provide readers with clear picture of how CRM and KPIs are related together in Enterprise X.

#### 4.4 CRM- system of the Enterprise X

In Enterprise X, CRM plays just as significant role as the sales staff. Within the entity of sales function, the sales staff, or in other words, people having sales as major task, can be compared to users of technology and CRM is technology by itself. It doesn't manage customer relationships independently of users, but rather in close collaboration with them. Generally speaking, the CRM of X acts as an enabler of customer relationship management and facilitator of parties' communication efforts.

The CRM of Enterprise X is named Cbook and it is developed only for usage within one specific company. The main reason for that is unique design of X's sales processes: Account Managers take complete responsibility of the sales process, from prospecting to developing customerships, apart from many firms that outsource prospecting and booking stages to separate booking service companies. The main idea behind this is to build stronger customer ties, because as relationships are cornerstone of every sale, building them up right from the first contact is crucial. (Care & Bohlig 2008.) Cbook was designed to support this mindset of complete customer relationship control by assisting in every stage of the sales process. Cbook does this by holding prospect lists inside, building a complete supporting framework for calls, providing with information during meetings, assisting with required documentation and showing customer's order history. To understand why CRM is such a powerful tool for the sales staff, it is vital to understand its architecture and technical features, that are to be presented.

Architecture of Cbook houses a number of elements that are cornerstones of its functionality. Basically, Cbook consists of two layers: user interface and database. User interface consists of:

- **Dashboard:** can be characterized as a layer that holds inside all the elements described below. Acts as a command center, from where user is able to navigate to different parts of the system
- **Main information board:** the major element of CRM interface displays summary of all the events in the system: incoming reminders, changes in prospect statuses, the latest calls and messages, the most recent transactions and meetings. Provides a user with a possibility to take a quick look without going deeper into the system

- Filters: divide all the prospects of AM into groups, for example, according to custom tags or status of prospects. This section also contains a common list of all unsorted prospects assigned to AM
- Search function: enables search of all the prospects registered in Cbook. Acts as one of major sources for prospecting
- Analytics interface: displays statistics of Account Managers on daily, weekly and monthly levels and can be used to benchmark one's results against others. For instance, amount of call and meetings is one of important KPIs for Account Managers throughout the whole organization. Can also measure how well AM reaches the goals set.
- Tags: help to identify and divide prospects of AM into groups according to their features. Intention is to make sales planning easier when knowing how to approach prospects.

In turn, the database holds all the data tables about customers, transactions and employees, also containing features of the previously mentioned elements. One of distinctive features of Cbook is impossibility to delete records by any means, even if, for instance, customer record was created by accident. As the research highlights the sales staff as a major research element, it is justified to start with reviewing role of the staff inside the system. Basically, there are only two types of persons, customers and Account Managers:

- Customers: they carry code name "Prospect" and have various indicators designed to describe their state: cold prospects or assigned to Account Manager, contact details, interaction history, previous contracts, reference number etc. Every customer has its own profile with variety of contact persons, depending on firm's size. For instance, large companies can have contact persons from various departments as every department can make independent hiring and purchase decisions
- Account Managers: in Cbook, all members of the sales staff have code name "Account Manager" to keep it simple. In reality, also Sales Assistants, Team- and Branch Managers also belong to this category, not only titled Account Managers. There is one Account Manager assigned to each customer. If not, there exists default selection "Cold client", which means that this customer is available to take at the moment.

Cbook possesses flat hierarchy. This means that members of the sales staff are not divided into teams neither have a supervisor or boss on system level. All the hierarchical relations are defined outside Cbook and virtually all the sales persons in the system are on the same level. In turn, customers are ranked, according to their status: they are classified as Buyers, Former Buyers, Cold Prospects or Never Contacted. This categorization

helps to select a correct approach to a customer, because Account Manager has to decide how to establish a first contact before moving a prospect to his or her own list.

Another significant class in Cbook consists of different transactions. In this CRM system, transactions can be defined as movement of information, cash and services between employees and customers. There exist three kinds of transactions: notes, quotations and agreements. Notes are literally pieces of information sent from employees to customers, for instance, information about meetings, services, answers to customer's question etc. Quotations and agreements, accordingly, are also sent by employees to customers, when need for X's services is identified and confirmed.

After this general introduction, it is time to review CRM's connection to different parts of the sales process and after this, key aspects of the sales staff performance will be discussed in details.

#### ***4.4.1 CRM and prospecting***

As mentioned in Section 4.3.1, Cbook is one of the best sources for finding prospects when forming calling lists. Why so? Normally, recording new prospects requires significant amount of time to complete: prospects need to be found and extracted, often from scattered sources. Details are to be registered and status to be given, so creating a prospect consumes more time than simply searching already created prospects from the system with search function. To understand what influence does CRM system have on efficiency of prospecting outcomes, we can compare two ways of prospecting: external and internal search.

A typical procedure for searching prospects from outside the system involves surfing through a long list of companies, for instance, in Kauppalehti, the Finnish major business newspaper. An official page of Queensland Government (2016) proposes that prospect information in CRM should contain at least the following vital elements in order to be taken all the benefit of: time and date of contact, a sales person responsible, a way of making a contact, content of written interaction and outcome of contact. This means that X needs to know prospect's name, its e-mail or contact number, persons in charge for HR decisions and an address of a company to arrange meetings. It is also desirable to take a look on company's financial status before contacting for a first time: usage of time resources doesn't make sense if a prospect company turns out to be a bankrupt. As Kauppalehti and many other similar sources often contain only limited and incomplete information regarding prospects (for instance, holding only a company name and address without contact number and credentials), a sales person is forced to look for extra information

from other sources, for example, from company's webpage. After all the required details are found, a sales person has to register a new prospect in Cbook by filling out all the necessary fields. As an Account Manager of X makes at least dozens of calls every day with only fraction of prospects taking the call, it means a huge need for fresh calling lists and new prospects. With limited time resources, the sales staff in X is often using considerable amount of time for important but time-consuming tasks. External search is the only way to find truly fresh uncontacted prospects, but its average duration still leaves a lot to be desired in terms of efficiency.

In case of internal search, an Account Manager simply activates a search function on Cbook and selects search parameters of desired prospect: city, state (free or occupied, Former Buyer or Cold Prospect), date of previous contact. After, AM executes the search and a list of matching prospects already registered in the system pops up. This approach enables to form a fresh list of prospects just in matter of minutes, but has a downside: all the prospects in the list have been already contacted some time ago. On the other hand, this approach saves huge amount of time and as many sales efforts require more than one time to succeed (for instance, Atwood (2013) writes about 80% of sales requiring 5 follow-up calls), it paves the way to call already contacted customer one more time and to land a possible deal.

Cbook also offers multifunctional operability as it supports prospecting tags. This means that Account Managers can mark prospects with different tags to make them distinctive. For example, prospects can be marked according to their industry, size, number of employees and other factors. The sales staff can create own tags to match own professional needs. For instance, tags referring to the next date of contact like "Call him the next week" turned out to be success as AMs could find certain prospects from a huge mass in matter of seconds and process of prospecting could become more timed and structured.

#### **4.4.2 CRM and booking**

Directly after filling lists with fresh prospects, Account Managers move along with booking appointments, because without meetings it is almost impossible to sell highly specialized services of X. In past, booking was executed by simply entering a number of prospect into phone and making a call, but such approach was time-consuming as entering numbers by hand takes time. According to statistics gathered by The Brevet Group (2014), only every 8th cold call can reach a prospect and as 92% of sales happen with involvement of



phone, it makes sense to make booking process more efficient. Usage of CRM- system is one of such streamlining approaches and this is based on its method to enable bookings: by automating calling process and by allowing to generate materials to support the next steps of the sales process.

Cbook has extended functionality regarding automatization of calls. When opening a prospect profile, Account Manager simply presses a phone number displayed within and Cbook connects to a prospect, so there is no need to manually enter the number. In fact, Cbook doesn't have in-built calling interface but rather uses integrated Skype for Business- application, which is configured to dial all the numbers coming from Cbook. While talking with a prospect via Cbook, Account Manager can complete multiple tasks simultaneously: search more information about the prospect over the Internet to use it in the conversation, fill out customer's preferences, operate calendar etc. Thus, Cbook enables multitasking, which increases efficiency of a sales person. Additionally, Cbook contains a collection of sales call scripts that can be exploited to resolve different kinds of booking situations: when a customer doesn't have time to meet but proposes sending him e-mail instead, when a secretary refuses to connect a caller to her boss, and many others scenarios. Generally speaking, Cbook greatly increases number of calls made and with statistics of every 8th call to reach a prospect, it is obvious that more calls need to be made in order to get more bookings. Also, Cbook makes calls more efficient as they can be supported by materials stored in the integrated platform.

Not only automated calls but also stored materials make Cbook an useful tool for bookings. As Account Manager makes a call via Cbook, he also gains access to prospect's profile with plenty of fields to make notes. For instance, it is important to write down all the perceptions heard during the call: customer's needs, past experiences, answers to AM's general questions and all the other pieces of information to form a business portrait of a customer. Especially, if a customer takes a meeting and decides to set up a collaboration with X, all the notes made form a base of long-lasting customer relationship management, because they remove need to ask the same questions again and give a customer such a feeling that he or she is really taken care of and listened to. Additionally, notes assist Account Managers in making offers because a basic type of offer typically needs to be prepared before a meeting in order to accelerate the sales process and to shorten its cycle. To summarize, we can state that integrated prospect information in CRM, based on booking call, is really helpful for taking the next step: a meeting.

### 4.4.3 *CRM and meeting customers*

In Enterprise X, meeting clients in person brings majority of all sales, because it is much easier to explain details and to demonstrate cases and references. In order to complete a successful meeting, Account Manager not only needs to convince a customer with features of X's service and its usefulness for customer's business, but also with his/her external layout: clean suit, confident tone and solid equipment. By having solid, modern and appropriate equipment like notebook and relevant software (in this case it is a CRM system), Account Manager not only appears as true professional, but also gets a structured and efficient approach to handling customer information: instead of making notes into scattered and vague sheets of paper that can get lost, all the information can be both extracted and saved in few clicks, into the same location.

Lets review a typical example of information extraction during a meeting. As every meeting starts with a short introduction of both parties, it is justified for Account Managers to make useful notes to exploit those in later stages of meeting. In many cases, a booking call has been long and detail-rich, so a customer supposes that Account Manager already has previous knowledge of customer's company. In this kind of situation, having easy and quick access to customer's information plays central role in winning customer's trust and to give smooth start to the meeting. This can be reached with help of Cbook, that provides instant access to various types of files. Typical documents and pieces of information, access to which is vital to ensure beforehand:

- Details of booking call (customer's company information, branch, field of activities and current situation shortly)
- Pricelists and written introduction of X's services
- References to business cases and similar customers
- Customer's CRM profile.

A sales person not only extracts information from CRM, but also uploads a lot of customer details received during the meeting in order to either establish customership in the next stage or to reject a customer as a profile of low priority due to poor profitability or unstable financial situation. Typical documents to be uploaded into Cbook are:

- A full description of customer's current situation
- Customer's needs
- A service proposition plan (type of service, length of contract, candidate profiles...)
- Mapping of X's capability to provide desired service
- Schedule to move into the next phase

After customer has been analyzed by Account Manager, it is time to establish customership or to reject a customer. Establishing a new customership has its own specifics and is to be discussed in the next section.

#### **4.4.4 CRM and establishing customership**

If a customer is approved by Account Manager, AM can start preparation of establishing customership. In Enterprise X, a customer becomes paying customer only after signing a contract. In stage of forming customership, Cbook plays a central role because of its organizing structure and documentation ability: all the contracts and related documents are stored within the system as well as responsible persons are linked to a customer. A typical process of creating new customership includes the following steps:

- Selection of relevant contract template (staffing service, direct recruitment etc.)
- Filling in customer's details and additional information
- Updating customer's CRM profile: changing status from Prospect to Buyer, adding contact persons on customer's side
- Saving a contract in both electronical form in Cbook and uploading a scanned paper copy as attachment
- Assigning responsible Account Manager and Consultant Manager (recruitment specialist) to a customer.

After adding all the details to the CRM profile and sending a copy of a signed contract to customer, new customership is officially established. However, in X's business not everything goes as planned and customer can still disappear from the list of paying ones. This can happen due to various reasons: a profile of job might be too demanding and X is unable to fill customer's order in time; customer is not satisfied with quality of X's service and aborts a contract or customer's financial state might have changed during the process. To deal with this, Cbook offers an easy option to manage customerships: if Account Manager presses "Contract lost"- button, customer's status automatically changes to Prospect or Former Buyer from Buyer. Basically, Cbook offers coherent way to manage AM's customer portfolio: customer's state changes according to state of contracts: if a customer doesn't have any active contracts registered in the system, he becomes either Prospect (if not having any completed contracts) or Former Buyer (no active contracts at the moment but at least one completed in past). This approach enables Account Managers to handle customers of different types in different ways: Prospects and Former Buyers can be contacted to get feedback or to identify new opportunities, contacting Buyers, in turn, generates new potential deals and helps to decrease customer churn, because maintaining continuous contact with existing customers avails taking better care of them.

In the next section, CRM's benefits in developing customerships will be discussed in more details.

#### **4.4.5 CRM and follow-up of customership**

In Enterprise X, it has been known for long that retaining existing customers is much more cost-effective than acquiring new ones. Before implementation of Cbook, all the customer records, files and contracts were scattered around in form of plastic maps filled with paper sheets and it took long to find a required document or file. When Cbook arrived, everything changed. Cbook has two main effects, affecting making post-sales and developing an existing account: enabling follow-up of existing customers and making reference sales.

First of all, Cbook stores all the contracts made with certain customers and provides AM with easy access to them. In customership lifecycle, it is important to contact a customer on regular basis to make sure that everything goes according to plans, customer satisfaction is at fullest and just to ask about plans for an upcoming year regarding need for extra services. In some companies customer engagement is left to near zero, although in modern business field it is vital to activate customers in multiple ways and to keep him/her engaged as competition is huge. According to Wang (2011), ways for longer-term engagement and building long-term relationships have come to stay and we are moving from transactional economy to relationship management. This is why a simple call to customer by Account Manager can help to keep up with customer's real situation and to give customer such a feeling that he or she is taken care of. Additionally, these calls are not only to provide AMs with overview of customer's situation, but to land a possible face-to-face meeting to further discuss with a customer. As X has observed, a customer who bought once, is likely to purchase more if satisfied with outcomes of ordered services, and that is why Cbook is useful tool to support this mindset: it displays customers with Buyer- status and shows interaction-and purchase history, so AM can decide if it is a right time to activate the customer or not.

Typically X's customers have broad network of professionals and this can be exploited by the sales staff of X. As customers buy more likely from someone who is known, it makes sense to ask existing customers if they know someone who might be in need for similar services. It is proven to be a solid way to generate extra sales as around half of calls to existing customer's network members resulted in meetings and even in straight sales. Typically, leads are given over phone or during meetings and, basically, leads can

be used to encourage customer to give them: for instance, lower recruitment fee if a customer gives leads that result in new sales. Cbook offers a way to register leads and to link customers and their referrals together and there have been plans to even establish a customer-loyalty program based on leads and customer's "participation" in making new sales for X.

As it was discussed, Cbook offers great tools throughout the whole sales process in X. Cbook is not only about functionality, but about gathering and displaying sales person's metrics and KPIs, so in the next section it is going to be discussed, what KPIs and metrics are crucial for every sales person and how Cbook deals with them.

#### 4.5 Measuring performance of sales staff

In Enterprise X, performance of the sales staff is measured on regular basis in order to ensure achievement of goals and to close performance gaps by identifying reasons. Measurement of performance has its own specifics in X: not all the metrics stay within CRM, but are to be announced in beginning of every week. This means that, for example, best performers of each metric are revealed to the rest and awarded during Monday openings, and this mindset aims to drive the sales staff towards striving to achieve new heights. So far, this has worked well and the staff was inspired to break records.

Main instruments for performance measurement are various KPIs. There are own KPIs for every stage of the sales process and they have different meaning and structure for every position: for instance, bookings are more important for Sales Assistant than for Account Manager. KPIs and rewards for achieving and exceeding set goals are defined and confirmed by the Executive Board of X. KPIs are decided to cover not only monetary, but also functional and intangible aspects of the sales process, because in X, successful sales are not only about generated cash flow, but rather about retaining customer satisfaction and well-being of employees. There are not only individual metrics, but also team metrics that are applied every Friday. Every Friday sales teams have so called "Booking competition" and the main goal is to make as many calls and bookings as possible. Winning teams are rewarded with money. Metric list is gathered into table below.

Stage of the sales process	Metric name & type (i=individual, t=team)	Applied to & significance (s = secondary, p= primary)
Prospecting	Amount of prospects per day(i)	SA(p), AM(p), TM(s), SAM(s)
Prospecting	Average length of prospect list(i)	SA(p), AM(s), TM(s), SAM(s)

Prospecting	Overall quality of prospect list (ratio of promising customers vs doubles and non-promising prospects) (i)	SA(p), AM(s), TM(s), SAM(s)
Booking	Amount of calls per day(i, t)	SA(p), AM(s), TM(s), SAM(s)
Booking	Amount of bookings made per day(i, t)	Sales Assistants (p), AM(p), TM(p)
Booking	Booking hit rate (calls/bookings)(i)	Sales Assistants (s), AM(s), TM(s), SAM(s)
Meeting	Amount of meetings per week (i, t)	AM(p), TM(p), SAM(p), KAM(s)
Meeting	Meeting hit rate (bookings/meetings) (i)	AM(p), TM(p), SAM(p), KAM(s)
Meeting	Meetings per deals hit rate (number of deals/number of meetings)(i)	AM(s), TM(s), SAM(s), KAM(s)
Establishing customerships	Number of new contracts per week (i)	AM(p), TM(p), SAM(p)
Establishing customerships	SOV (Sold Order Value) per month (i, t)	AM(p), TM(p), SAM(p), KAM(p)
Establishing customerships	Revenue per customer (i, t)	AM(p), TM(p), SAM(p), KAM(p)
Establishing customerships	Team total sales per month(i)	TM(p)
Establishing customerships	FOV (Filled Order Value, means how successfully SOV was filled) per month (i, t)	AM(p), TM(p), SAM(p), KAM(p)
Developing customerships	SOV New (value of new orders sold to existing customers)(i, t)	AM(s), TM(p), SAM(p), KAM(p)
Developing customerships	FOV New (i, t)	AM(s), TM(p), SAM(p), KAM(p)

There are also metrics located outside the sales process. However, they are not going to be used in empirical part of the research as they don't belong to the sales process:

- Total sales of office. This metric is applicable to Branch Manager
- Total sales of Enterprise X. This metric, in turn, is applicable to Head of Sales.

As readers can see, Enterprise X has a great variety of different metrics to measure performance of its sales staff. In the following chapter, empirical part of the research is

going to be presented. First, materials and method of research is going to be demonstrated, after, results and analysis will be presented and discussed. The aim of empirical part is to show gathered samples of real life and to connect them with case of Enterprise X. After that, a goal is to find connections between performance of the sales staff expressed in KPIs, and their usage of CRM in different sales process stages.

## 5 MATERIALS AND RESULTS

### 5.1 Gathering materials and sources

As mentioned before, theme interviews were selected as a main method to gather needed materials. This choice of method has certain explanations:

- As the topic is highly qualitative (interaction of CRM- system and sales staff is based on experiences and interpretations), interviews are a good way to document these experiences for further purposes
- As the author worked in Enterprise X, it makes it relatively easy to get materials from former colleagues
- This method provides high level of flexibility, as members of the sales staff are always extremely busy and interviews can be conducted either face-to-face or via e-mail. The latter one is good for its independency on time and place

Focusing on the right target group was one of prerequisites for getting relevant and first-hand data. As the research concentrates on connections of CRM and members of the sales staff, it made sense to pre-select the latter as main sources of data. As mentioned in Chapter 4, Cbook of Enterprise X was deployed to serve needs of the sales process and that is why it is only coherent to include sales staff members involved into the process. These are Sales Assistants, Account Managers (also Senior ones included), as well as Team Leaders. With this selection, all five steps of the sales process were covered.

Five persons were chosen for interview rounds and as objective was to ensure heterogeneity of responder pool, one Sales Assistant, three Account Managers and one Team Leader were asked to provide answers to interview questions. Three of those persons chose to provide answers in written form due to business and difficulties to find time for face to face interview, the rest of two preferred to give face-to-face interviews. All the selected sales staff members have solid expertise in their own areas of the sales process and use CRM at daily basis, so they are considered to have at least sufficient knowledge to share. As target persons asked for retaining anonymity of interviews, no names are to be published. All the participants were provided with interview questions beforehand in order to ensure high quality and to decrease pressure on answers.

Partially, answers have been processed in written form: a Word- file with questions has been sent to recipients and they have been asked to fill the file out with answers. The rest of answers have been recorder with mobile phone's recorder function and littered. In



both cases, all the questions and answers have been copied and pasted from original files into this research. The original files are available separately.

## **5.2 Research method**

The research is limited to one pre-selected enterprise with its specific sales process and staff. As case study examines research data within a limited content with selection of limited groups and people (Zaynal 2007), choice of case study as research method is justified. According to Zaynal (2007), it allows deep understanding of a subject being observed and allows to analyze complex entireties. The main method to gather needed materials for analysis will be theme interviews. The definition for theme interviews stands for relatively informal interview, in which all the questions are focused around pre-defined topics (Puustinen 2013). The objects of interview are limited to the sales staff of the Enterprise X, who deal with different stages of sales process.

There have been originally over 25 questions, which were narrowed down to 15. This caused by double meaning and repeating nature of some questions and as purpose was to only keep unambiguous ones, some questions have been sorted out. Their choice has been driven by author's work experience and research's need: not only technical side of topic, but rather both technical and mental sides played a vital role in everyday work of sales person. As experience has demonstrated, CRM covers a much deeper area than just carrying out daily tasks in CRM- aided way. Instead, also moral and mental aspects step into spotlights at that point as people tend to think about work-related issues also outside their working time, there are feelings and perceptions surrounding job- related functions. It has been also well known by author's experience that there are also wide challenges and problems in daily CRM usage and this topic has been considered to become a suggestion for future research. Therefore, it made sense to place CRM- challenge related questions into interviews to justify a need for such topic. The questions will be discussed more in 5.3.

## **5.3 Interview questions**

In design of the interview (theme interview by its type), all the questions were divided into three groups/themes to cover major aspects of user- CRM interactions: functional

impacts of CRM, mental impacts of CRM and challenges caused by CRM to users. Suitability of such questions to context of the research was ensured by author's own experiences of using Cbook and need to shed the light upon them. In Enterprise X, CRM not only affects executing direct tasks of its users, but also impacts their mental wellbeing, which reflects on performance, too. To understand all the impacts of CRM on one's performance in complete way, not only positive but also negative sides have to be reviewed as well. Originally, there were over 20 questions to present, but after careful reconstruction and grouping some were left off to avoid overlapping. Therefore, total number of questions was reduced to 16.

Questions of the first group (functional impacts of CRM):

- What are general impacts of CRM on your tasks (prospecting, booking, meeting, establishing customerships, developing customerships)?
- What impact do visual elements of CRM have on your tasks?
- On scale from 1 to 5, how important are effects of CRM's visual elements on your tasks? Justify.
- What features would you like to include into current CRM? What is missing, suggestions?
- Please, tell about your experiences related to integrated analysis tools?
- How satisfied have you been with CRM?

Questions of the second group (mental impacts of CRM):

- How does CRM affect your wellbeing at work?
- How does CRM affect your professional development?
- What is the most fascinating in using CRM?
- What kind of feelings does usage of CRM awake?
- What significance does CRM have for you?

Questions of the third group (challenges of CRM):

- What CRM- caused challenges have you seen during your career, if any?
- Tell about your negative experiences regarding all your work tasks
- Tell about useless features of CRM, that are not helping you to execute your tasks
- How do you believe CRM- caused problems can be prevented?

As Enterprise X is a Finnish company with majority of its employees having Finnish as native tongue, the interviews were conducted in Finnish, too. For purpose of this research, all the interviews are translated to English, but the original ones are enclosed as

well. The questions were designed in such a way that enabled responders to answer accordingly to their job responsibilities and tasks. For instance, Sales Assistant didn't have to tell about connection of his/her meetings performance and CRM, because role of SA is only limited to the first two stages. In the next section, results and analysis of interviews are to be presented.

## 5.4 Results and analysis of interviews

In this section, results and analysis of interviews are going to be presented. To provide readers with broader and as unbiased perceptions as possible, all the interviews are presented in their complete and original form. As responds were received in Finnish, required translations were made and meaning and points of original texts were not affected by translations. In total, five interviews were completed and analyzed.

The main process of analysis consists of defining major themes regarding the phenomenon being researched, extracting arguments from interviews and allocating these arguments around suitable major themes. After this, the main research question can be answered by connecting the arguments to corresponding KPIs of sales staff performance and providing with explanation of suitability of the chosen argument. We need to notice that the same argument can be applied in multiple themes, for example in prospecting and booking simultaneously. Additionally, general theme-related arguments ("In prospecting and booking, it is my right hand, good and versatile tool") that cannot be directly connected to KPIs for explanation, will not be taken into account. As the sales process forms holistic background of the research and we are interested to explore CRM's impacts on performance of the sales staff in different stages of the sales process, it is justified to select its parts as major themes, so these are prospecting, booking, meetings, establishing customership and follow-up of customership. Example of the argument extracted from the interviews with applying KPI and the theme "Prospecting":

Theme: prospecting

Argument: CRM helps me to recognize such customers, that are not already occupied and I take such customers to my calling list

KPI: Amount of prospects per day

Explanation: It is easier to grow amount of prospects if unoccupied prospects are available.

### 5.4.1 Theming “CRM and prospecting”

As mentioned previously, all the arguments being present in the interviews, will be gathered around certain predefined themes and then connected to Enterprise X’s sales KPIs in order to analyze them. These themes are all the stages of the sales process: prospecting, booking, meetings, establishing customerships and development of customerships. Theming will be presented in form of table with 4 columns: theme, argument, related KPI and explanation. *Each argument will be written only once in order to avoid repeating the same arguments across all the interviews.* However, not all the arguments have related KPI: for instance, prospecting is only measured with 2 KPI:s and the rest of arguments cannot be measured, despite they are still helpful to sales staff. The table “Impacts of CRM on prospecting” is presented below.

Theme	Argument	KPI	Explanation
Prospecting	“In prospecting, CRM helps me to recognize such customers that are not already occupied”	Amount of prospects per day	Presence of unoccupied prospects increases chance to add them into sales person’s calling list
Prospecting	“In prospecting, logos help to recognize firms”	Amount of prospects per day	Sales persons are typically adding high-quality prospects (well known companies, stable ones etc), so logo helps to source such prospects more easily and to add them into calling lists.
Prospecting	“In prospecting this helps me to avoid firms that have been called many times during the year”	Amount of prospects per day	A sales person saves time to add promising prospects to his/her list instead of prospecting non-promising customers
Prospecting	“There is no possibility to add photos so customers are faceless”	-	-
Prospecting	“One cannot delete customers and they remain hanging in the system”	Average length of prospect list	Impacts efficiency of prospecting negatively, because there might be a lot of prospects in one’s list, but of low quality: doubles, non-promising etc.

Prospecting	“CRM integrates all the needed customer information within form of a single system”	Average length of prospect list	The more information is available for sales staff, the more prospects they will have on their calling lists, because the more complete is prospect information, the sooner the prospect will be added to calling lists.
Prospecting	“This means time savings when I prospect”	Amount of prospects per day	The less time one prospect takes to be prospected, the more prospects can be found during a day.
Prospecting	“CRM enables faster prospecting”	Amount of prospects per day	The less time one prospect takes to be prospected, the more prospects can be found during a day.
Prospecting	“CRM shows, which customers are low-profitable”	Overall quality of prospect list (ratio of promising customers vs doubles and non-promising prospects)	The bigger ratio is, the better chance a sales person has to convert his/her prospects into paying customers.
Prospecting	“In case if there are double-customers in the system, I might prospect them by accident...”	Overall quality of prospect list (ratio of promising customers vs doubles and non-promising prospects)	Presence of double customers lowers ratio and causes low-quality of prospect list, reducing chances to push prospects down the sales funnel.

Prospecting	“Also non-relevant comments written by sales persons overload the system and make it difficult to look for relevant information, for example, in prospecting”	Amount of prospects per day	Useless notes and comments slow decision making of a sales person, whether to include a prospect into list or not.
Prospecting	“Another employee moved my customers to his own list during prospecting and they disappeared from my list”	Average length of prospect list	There are less prospects available in the list if someone takes them.
Prospecting	“Easiness of handling customer information must be the most significant impact, because time is saved especially in prospecting”	Amount of prospects per day	Less time is consumed per prospect.
Prospecting	“Colors are relaxing and balanced, help to concentrate and this affects prospecting”	Amount of prospects per day	Improved concentration leads to bigger prospect amounts, because all the attention can be paid to the process.
Prospecting	“In prospecting, the most important is CRM’s ability to retain customer information and to offer this immediately to use”	Amount of prospects per day	Reduces time needed for decision making, whether to take a prospect or not.
Prospecting	“Differentiation of branches would help”	Overall quality of prospect list (ratio of promising customers vs doubles and non-promising prospects)	Some branches are more profitable than others and that is why they are worth prospecting.
Prospecting	“The tool doesn’t reveal how many prospects did I gather”	Amount of prospects per day	A sales person can’t control his/her achievements and this decreases overall results.
Prospecting	“I am very satisfied with its simplicity to prospect”	Amount of prospects per day	The simpler a tool is, the faster prospecting can go on.
Prospecting	“I create lists really efficiently, because I don’t have to waste time to prepare those”	Average length of	The prospecting lists will be longer and better if the

		prospect list	prospecting process is easy and efficient.
Prospecting	“Many high-quality and already contacted prospects can be found from there”	Overall quality of prospect list (ratio of promising customers vs doubles and non-promising prospects)	Already known prospects are more like to accept meeting and to buy X’s services, because “ice” is already broken.
Prospecting	“Updates have failed many times and doubles are present in vast numbers, which makes prospecting slower”	Amount of prospects per day	If the system is unavailable, less prospects can be added to the list.
Prospecting	“I can leave bad, non-promising customers and save great amount of time”	Amount of prospects per day	Helps to dump bad prospects right away and to prospect the next ones faster.
Prospecting	“It is the most important to use filter function, with them I can eliminate all so called one man- companies and reserved customerships. Additionally, CRM shows when a customer was contacted previously and it predicts to long extent if it is worth to put time into some customerships”	Overall quality of prospect list (ratio of promising customers vs doubles and non-promising prospects)	Having high-quality prospects in the list increases probability of moving them to the next sales process stage.
Prospecting	“If CRM could update its customer information straight from company registry, it would be great in prospecting stage”	Overall quality of prospect list (ratio of promising customers vs doubles and non-promising prospects)	As there is no update function at the moment, CRM impacts negatively efficiency and quality of prospecting process: if a prospect becomes bankrupt, it can’t be seen by a sales person and might be prospected.

Prospecting	“One must prospect new names to have enough to call, everything starts from customer information and customer history, that are found from the same place when I need them the most”	Average length of prospect list	There are more prospects in an average list if they can be assessed and added faster.
Prospecting	“It replaces telephone books”	Amount of prospects per day	Time per prospect is reduced by technological advantages like faster opening of pages and moving between sections.
Prospecting	“Messy prospects (there are many notes made by salespersons and that are irrelevant”	Amount of prospects per day	Useless information makes slows the prospecting process as more time is needed by sales persons to make prospect-related decision
Prospecting	“Irritating pop-ups”	Amount of prospects per day	Pop-up comes up every time a sales person decides not to add a prospect and to go back to previous menu, this cause a sales person to waste time.
Prospecting	“CRM guarantees that I get the lists done”	Amount of prospects per day	CRM helps to get sufficient amount of prospects in order to build good calling lists
Prospecting	“I like the most CRM’s ability to support my prospecting at least in numbers”	Amount of prospects per day	CRM makes it technologically easier and faster to prospect
Prospecting	“Doubles fill up the calling list only seemingly”	Overall quality of prospect list (ratio of promising customers vs doubles and non-promising prospects)	Doubles force ratio to go down and this causes smaller probability of pushing prospects down the sales pipeline.



Prospecting	“When the gang steals my customers, because in Cbook one can drag prospects from another’s portfolio to his own”	Average length of prospect list	CRM causes prospect lists to become shorter, because prospects can be easily moved to calling lists of other sales persons.
Prospecting	Additionally, the fact that even with phone number or registration number i wasn’t able to check if such customer already exists, comes up to be the first bad thing in prospecting.	Overall quality of prospect list (ratio of promising customers vs doubles and non-promising prospects)	One can’t check with certain fields (VAT- number, company registry etc.) if a customer already exists and ends up with creating a new prospect that exists in reality. This causes many doubles to be added into calling lists.
Prospecting	it gives me such an interface that helps me to create calling lists, to keep a book to whom have i taken contact, to whom have my colleagues taken contact and it also helps me to rank different firms as i see what they have responded, what have they said and is it worth to take contact to these people.	Overall quality of prospect list (ratio of promising customers vs doubles and non-promising prospects)	The relevant information helps to fill calling lists with high-quality prospects and increases chance to convert them into paying customers.
Prospecting	In prospecting the most important is that company database is broad and has much content, and that search system is made well, so i can fluently limit my search and it gives me relevant and updated search results.	Overall quality of prospect list (ratio of promising customers vs doubles and non-promising prospects)	Up-to-date prospect information improves overall quality of prospect portfolio.

#### 5.4.2 Theming “CRM and booking”

Theme	Argument	KPI	Explanation
Booking	“In booking, I can use acquired arguments to convince a customer and get a meeting”	Amount of bookings made per day/Booking hit rate	If it is easier to get a meeting, more bookings will be registered per day and the better is hit rate of calls/bookings
Booking	“When I book, I know what to say, thanks to information from CRM”	Amount of bookings made per day/Booking hit rate	When there is enough necessary information available, it is easier to find needed arguments to convince a customer.
Booking	“No possibility to build organization trees, from CEO to operative level, booking would be easier”	Booking hit rate	It is more likely to get a meeting with appropriate person and that is why less calls can lead to more bookings if focused right.
Booking	“Missing some sort of interactivity (greetings, summary, ideas?). This would motivate in booking, because it requires a lot of resources, mainly mental ones”	Amount of bookings made per day/Amount of calls per day	The more motivated and encouraged a sales person is, the bigger is his/her will to get more calls and bookings
Booking	“Probably, the most important feature is this possibility to benchmark, so one can easily compare: how many bookings...”	Amount of bookings made per day/Amount of calls per day	With benchmarking made easy and transparent, adjusting one’s actions is simpler.
Booking	“CRM integrates all the needed customer information within form of a single system. Before	Amount of bookings made per day/Amount of calls per day	Technological advantage makes it waste less time per call and per booking

	the system ,we used paper call lists in booking”		
Booking	“This means time saving when I book”	Amount of bookings made per day/Amount of calls per day	Less time used means greater call and booking numbers
Booking	“Every Monday there is booking competition and if CRM is down for a moment, victory is under threat as there is no access to customer information”	Amount of bookings made per day/Amount of calls per day	When the system is unavailable, less call and bookings are to be made.
Booking	“In booking, double customership causes double calls”	Amount of calls per day/Booking hit rate	CRM impacts amount of calls positively, but causes worse hit rate of calls/bookings.
Booking	“In booking, speed is essential so customer’s number is pushed into the calling system with one click and call is started”	Amount of calls per day	The less time it takes to call a customer, the more calls can be made during work shift.
Booking	“Different KPIs help me, for instance, how many times did I call during the day”	Amount of calls per day	With proper statistics, one can adjust his/her actions to get more calls.
Booking	“Though, I am very satisfied with its simplicity to call customers straight away”	Amount of calls per day	When calling process is made easy, more calls can be made.
Booking	“It is easy to get easy bookings from them (high-quality and already contacted prospects”	Amount of bookings per day/Booking hit rate	High-quality prospects offer better booking numbers and increased hit rate of calls/bookings.

Booking	“Updates have failed many times and doubles are present in vast numbers, which harms booking, because many AMs are calling to the same customer”	Amount of calls per day	More calls are made as there are more prospects, but such calls are not of high-quality.
Booking	“Customer profile was entirely empty, I didn’t know where to take a grip while talking to a customer”	Amount of bookings made per day/Booking hit rate	Both are impacted negatively, as there are less bookings if arguments are bad or obsolete.
Booking	“CRM is opened all the time and there I save all the information received from customer, impact make it easier to write and manage customer information”	Booking hit rate	It is easier to get booking when contacting the same customer the next time, because arguments are written down into simple form.
Booking	“When I book, the system is quite fast to move between different tabs, so I can quickly access a calender to reserve a meeting with a client”	Amount of bookings per day	It takes less time to register a booking, so more can be made during a day.
Booking	“Except when I look at statistics by the end of a day: how many meetings did I book”	Amount of bookings per day	One can adjust his/her work when statistics are available.
Booking	“The largest stress factor in my work is continuous hurry and CRM can temper it: one has to book...Everything starts from customer information and customer history that are found from the same place	Amount of bookings per day	When information is easily accessible, one can book more and focus all the resources on booking instead of information search.

	when I need them the most”		
Booking	“Technical pauses on booking competitions, for instance, have been fateful, because suddenly, we couldn’t access calling lists anymore”	Amount of calls per day/Amount of bookings per day	Availability of the CRM impacts amount of bookings and calls.
Booking	“Customerships without contact information (it is “nice” to call such customers while booking)”	Amount of calls per day	Less calls can be made if there are no phone numbers to use.
Booking	“When I book, previously mentioned missing contact information is irritating, because without them I waste much time to complete them instead of booking”	Amount of calls per day	Less calls are made if one has to focus on searching for contact information instead of calling.
Booking	“I believe that CRM’s problems can be resolved with profound user training, especially related to booking. It is not to add useless comment to customer information and customer interactions have to be described in such a way, that also the next one would understand what it is all about”	Amount of bookings per day/Booking hit rate	Number of bookings is impacted negatively when a sales person has little or no grip at customer during calls, this grip arises from proper information.
Booking	“I can call in focused way without letting my attention away. Number of bookings grows as	Amount of booking per day/Booking hit rate	More bookings are made from calls with already contacted potential customers.

	consequence for high-quality prospects”		
Booking	“I must mention its call feature, so when I click customer’s number, it connects me straight to the customer”	Amount of calls per day	Less clicks are needed to make a call.
Booking	“I got inspired to book because I had read the book about fan shui and its colour world was just as relaxing and helping to focus, this somehow reflexes in booking numbers”	Amount of bookings per day/Booking hit rate	When relaxed and focused, a sales persons can convert more calls into bookings
Booking	“I like that CRM helps me to book, because I instantly get customer profile open, check that he wasn’t called before me, after ending of call I write all the observations into the profile”	Booking hit rate	When calling already contacted prospects, there is bigger probability to get more bookings.
Booking	“At least, I get a hell of boost when our boss goes through all the week statistics and I am the first one from one week to another, this helps to book more”	Amount of bookings per day	Transparent statistics motivate and give moral boost for improved calls/bookings hit rate.
Booking	“It is really important when one books meetings for me, so without good supporting system I would never get to my goals”	-	-
Booking	“When one starts to call, dismay in huge when one realizes that	Booking hit rate	There is a bigger probability of failing if one

	roughly every second prospect is bad, in booking this becomes visible and endless breaks annoy, when one tries to call along the list”		contacts “double customer”, who might have been contacted previously.
Booking	“The system has blocked me outside when I have been writing comments into fields about bookings”	Amount of calls per day/Amount of bookings per day	When a sales person has to write a lot instead of calling, calls and bookings are lost.
Booking	“When I call back to customer, I have called him, and he calls me back and I cannot find him basing on phone number”	Booking hit rate	Misunderstanding causes a sales person to lose his/her credibility and that is why probability of getting booking decreases.
Booking	“These comments that should be written as abstract as possible, and they should also be business-related and they provide a next salesperson with as many tools as possible to get forward”	Booking hit rate	Poor customer information doesn’t help to get more bookings.
Booking	“At least it makes my working so much more efficient, it gives me such an interface that helps me to keep a book to whom I have taken contact”	Booking hit rate	CRM helps to avoid contacting non-promising customer and that is why one gets more bookings when sorting his/her list out of non-promising prospects.
Booking	“It tells how many calls has one made and how many bookings, so it helps to follow up my	Amount of calls per day/Amount of bookings per day	Statistics tell of there were too few calls/bookings made, so a sales person can put

	development and working”		more effort into his activities.
Booking	“Why frustration? Because I ve contacted double that wasn’t marked as double or wasn’t deleted”	Booking hit rate	Non-promising customers cause to make more calls, but less bookings.

### 5.4.3 Theming “CRM and meeting customers”

Theme	Argument	KPI	Explanation
Meeting	“During the meeting CRM offers useful information, on what I can base my extensive questions to a customer”	Meetings per deals hit rate (number of deals/number of meetings	Additional questions increase credibility of sales person and improves trust between customer and sales person
Meeting	“In meetings I can take use of customer information printed from CRM to ask precise questions in cases, when a customer was met before me”	Meetings per deals hit rate (number of deals/number of meetings	The better information a sales person has, the higher are chances to get a deal by convincing a customer
Meeting	“I keep it open and write down all the things said by a customer”	Meetings per deals hit rate (number of deals/number of meetings	With precise information, better offers can be made to a customer and this increases deals/meeting rate.
Meeting	“CRM gives a considerable introduction to meeting”	Meetings per deals hit rate (number of deals/number of meetings	All the information stored in CRM can help a sales person to convince a customer with increased knowledge of his/her current situation
Meeting	“Sales statistics are handled in every week-	Amount of meetings per week/ Meeting hit	Transparent statistics help to understand,



	and team meeting, for example, how many customers were met”	rate (bookings/meetings)	what metrics leave something to be desired and improve one’s control of his/her actions (a sales person knows what to improve)
Meeting	“I can find everything my former and current colleagues, who visited the same customer, have written. So it fascinates that I can find historical data that helps me to success in customer meetings”	Meetings per deals hit rate (number of deals/number of meetings)	Notes, made by colleagues, can help to avoid useless questions and improve one’s knowledge about customer’s situation, business. This increases chances to find a right approach and to close a deal.
Meeting	“The biggest challenges that I have seen in my own personal work, are related to the fact that the system has blocked me outside when I have been writing comments into fields about meetings”	Meetings per deals hit rate (number of deals/number of meetings)	If the system prevents user from doing notes, the notes can be lost and this has negative impact on hit rate: less offers can be sent in certain time and important information can be missed, which decreases quality of offers.

#### 5.4.4 Theming “CRM and establishing customership”

Theme	Argument	KPI	Explanation
Establishing customership	“CRM shows me all the previous contracts made with a customer and, basing on these, I can take next steps”	Number of new contracts per week / Revenue per customer / SOV (Sold Order Value) per month	Improved customer information helps to tailor an offer to fit customer’s needs and increases a chance to get

			bigger contracts by increasing customer's willingness to buy
Establishing customer-ship	"There is a huge database in CRM, containing guidelines and principles, according to which our company builds customer relationships"	Number of new contracts per week	It is easier to get new customers with well-established processes and good practices
Establishing customer-ship	"The only help is red color that indicates customers with bad credit information"	Number of new contracts per week	As there is some amount of "bad" customers, CRM decreases number of new contracts by sorting such customers out
Establishing customer-ship	"CRM's ability to display credit information and payment history accelerates taking customership forward, because one can ensure if a customer is promising or not"	Number of new contracts per week	"Non-promising" customers are sorted out and low-profit contracts are prevented to be made
Establishing customer-ship	"When I create customerships, I always check credit information and one time CRM wasn't updated and this caused a big mess, because large order was sold to a customer without proper credit information"	Number of new contracts	Non-updated CRM may increase amount of contracts, but even bigger fraction of those are risky
Establishing customer-ship	"It is also good that in CRM are all of contract templates and I can confirm them straight in the system"	Number of new contracts per week / SOV (Sold Order Value) per month	More contracts and more sales can be made within certain amount of time if the process is smooth

Establishing customer-ship	“After this, I extract contracts from the system, confirm them”	Number of new contracts per week	Contracts can be confirmed faster, meaning
Establishing customer-ship	“Updated contract templates were missing when our pricing has changed, it was embarrassing to admit this in front of a customer”	SOV (Sold Order Value) per month / Revenue per customer	Customers tend to make smaller purchases if clarity of sales process is missing, and are more cautious
Establishing customer-ship	“Customer relationship is born by closing and all the required contract templates are in CRM, so it works as documentation tool”	Number of new contracts per week	Efficient system enables efficient generation of new customer relationships
Establishing customer-ship	“Affects closing, because all the contract templates are there”	Number of new contracts per week	New contracts are made and confirmed in time-efficient manner
Establishing customer-ship	“After the meeting I always create customer profile into the system and attach contract template to it if it appears to be type with promise”	Number of new contracts per week / FOV (Filled Order Value, means how successfully SOV was filled) per month	The earlier the customer and his/her needs are analyzed, the faster a contracts can be signed and customer needs fulfilled
Establishing customer-ship	“Because Cbook makes my work more efficient, I get at first place in new sales, for instance, so I get the most new customers”	Number of new contracts per week	More new contracts can be made and more customers acquired if CRM makes the whole process quicker and smoother
Establishing customer-ship	“Also template-related problems occurred too, because once template model I've saved has disappeared and I couldn't find a replacing one, so I had to search somewhere else”	Number of new contracts per week	Contract templates are crucial in order to manage establishment of customer relationship. Therefore, template-related problems slow contract signing down.

Establishing customer-ship	“Yes, and one big troublemaker is at least this “devil of popups” (for example, the error comes when one creates customers in wrong way, the red big one, after which the screen freezes for some seconds)”	Number of new contracts per week	Technical troubles force sales persons to focus on problem solving instead of sending contracts to their customers, and that is why it causes time-wasting activities
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#### 5.4.5 Theming “CRM and follow-up of customership”

Theme	Argument	KPI	Explanation
Follow-up of customer-ship	“With help of CRM I develop my customers, because I can see customers’ purchase history and, basing on this, I can send proposals to my customers”	SOV New/FOV New	With proper customer information available, a sales person can make better proposals and find right candidates easier
Follow-up of customership	“CRM holds all the transaction history inside. This helps me in sense that I know what to say to customer in order to get more sales”	SOV New	Broad information about customer’s purchases tells sales person, what to suggest next. Therefore, probability to hit “a right spot” grows
Follow-up of customership	“CRM also helped to stay connected to existing customers”	SOV New	CRM allows regular contacting. This reduces risk of customer churn, as X’s sales staff maintains tight contacts with existing customers
Follow-up of customership	“I don’t have to use too much time and efforts for information search”	FOV New	Information about required candidate is especially vital in order to

			find right profiles to fulfill customer's needs
Follow-up of customer-ership	"I had to quickly contact one regular customer and CRm lagged, so I couldn't talk to a customer, although we have agreed to have a chat. The customer was a little fractious..."	SOV New/FOV New	If the system prevents a sales person from getting into touch with customer, new sales and fulfilling needs can be at risk as customer's status update doesn't get made
Follow-up of customer-ership	"I always look from CRM, what kind of purchase history does the customer have and what is status of his/her organization at the moment"	SOV New	Previous purchases tell a lot: how much and what has a customer bought, what is the average size of purchase etc. Basing on this information, a sales person can make more customer-friendly suggestions.
Follow-up of customer-ership	"CRM works as good platform for "continuous milking" of customers"	SOV New	CRM enables maintenance of regular contact with customers. Therefore, probability to get new deals grows as new customer's needs are to be discovered
Follow-up of customer-ership	"Once, the information wasn't saved so I had to begin everything from the start"	FOV New	If a sales person can't properly fill in the information received by a customer, it is harder to fulfill customer's needs base on this information
Follow-up of customer-ership	"When i develop a customer relationship, in practice i look at all the interactions with this certain customer in the system and, basing on	SOV New	If buying is made easy and a sales person helps his customers with assistance of CRM, cus-

	<p>this, i recommend a customer how to to move on with new orders, for example.”</p>		<p>tomers place new orders with bigger probability</p>
<p>Follow-up of customership</p>	<p>“When i develop already existing customership, i base my decision on customer’s history.”</p>	<p>SOV New/FOV New</p>	<p>Detailed knowledge of customer helps to guide customer towards new purchases and helps to fulfill customer’s needs, CRM provides with that kind of information</p>
<p>Follow-up of customership</p>	<p>“Once, there was a funny situation, when i tried to get extra sales from my already existing customer and someone of new salespersons moved the customer to himself and already called the customer to tell being a new contact person.”</p>	<p>SOV New</p>	<p>If a customer can be “stolen” easily by any other sales person, new sales decrease as a customer gets confused and a new sales person has to build relationship from the start. This also weakens customer’s trust in X’s ability to handle its customers.</p>
<p>Follow-up of customership</p>	<p>“When i handle extra sales, it is cool to look at CRM and customer profile, what sales was made with them before, how well has a customer paid his bills and what kind of employees has he searched generally.”</p>	<p>SOV New/FOV New</p>	<p>Basing on CRM’s information, a sales person can increase his sales by putting more focus and effort into promising existing customers. Additionally, the information held by CRM provide a better base for decision making, which helps to fulfill customer’s orders and to get new ones.</p>
<p>Follow-up of customership</p>	<p>“in followup this is bad that the system is like very clumsy and it will</p>	<p>SOV New</p>	<p>Sales to existing customers decrease if a</p>

	never alarm if i didnt do followup until certain deadline, and this just remains.”		sales person doesn't remember to make regular followups and doesn't manage to activate customers in terms of new purchases
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## 6 CONCLUSIONS AND SUGGESTIONS

The interviews and their outcomes have demonstrated a vital role of CRM in maintaining a sales funnel and helping sales people to reach their goals. Not only purely technical, but also partially emotional aspects have been found to be helpful, but it is pretty obvious that some parts of the sales process benefit from CRM a way more than others. The same applies to arguments: there appeared to be overpresence of some arguments that repeated themselves throughout in answers. This is why many similar arguments were sorted out during analysis and theming in order to avoid repetition and to simplify conclusion making. It turned to be out that the repetitive arguments (an argument that can be expressed in many different ways and carries the same meaning, for example, “In prospecting, CRM helps me to recognize such customers that are not already occupied” (appeared quite often in various forms)) have taken up to almost half of all the theme tables in some stages (especially in CRM and prospecting). This fact has given strong support to the original decision considering writing each argument only once in order to avoid repeating the same arguments across all the interviews. To get a clearer picture of CRM’s significance for each stage of the sales process and to extract answers to the set research questions, results of each theme interview will be briefly discussed below, one part at time.

Interviews turned out to be a very effective method for gathering data as responders were granted complete freedom to form their answers. This can be seen in received answers, the most of which are rich in expressions and quite informal. It seems that choosing qualitative research as an approach to finding answers for the original problem has been a correct choice. CRM, just like any information system, consists of people apart of technical elements and this is why involved people should have be given a possibility to express their perceptions and experiences in a way they are used to: by talking about constantly changing and growing entity in just as free and scalable form. For every responder and person generally, CRM might have different meanings and that is why this topic is so complex: during analysis of interview data, many arguments couldn’t be connected to only one KPI, but had to be linked to many simultaneously, instead. Additionally, qualitative nature of research has helped to gain truly deep understanding on connection between CRM and stages of the sales process: a simple connection between KPIs and arguments wouldn’t tell us a lot without proper explanations that are based on experiences, professional practice and resulting interpretation can vary from person to person. In this research, author’s own interpretation has been utilized to draw conclusions. All the argument-KPI chains have received at least one explanation and this is a sign of well-extracted arguments having proper counterparts among X’s KPIs.



## 6.1 Summary of CRM and prospecting

As prospecting is known to be a starting point of any sales process, it was expected that CRM might have the most impact especially in this stage. Without prospects, there wouldn't be any further transformation into customer and deals and this is why it is relatively hard to maintain high-quality prospecting work in longer scope if no suitable tools are available to support the process. Analysis of interviews supports this claim: the most arguments of all could be connected to prospecting KPIs. Why so?

In sales, having a solid base of quality prospects can determine success of the most sales persons. It is number game: the more prospects one has, the bigger is probability to have quality prospects among the others and, in turn, this leads to higher deal numbers. Not every single meeting or customer call leads to signing a contract, but increases chances to do so. KPI of X related to that is named "Amount of prospects per day" and measures, how many new prospects a sales person was able to find during a day. Typically, this also affects another KPI called "Average length of prospect list" as this can be calculated by dividing Amount of prospects per day (summarized) by amount of days in month (for instance, 400 prospects /31 days get us an average length of around 13 prospects). As having high average number of prospects in list grants sales persons different rewards, both monetary and mental, every AM, SAM, TM and AMT strives to "mine" more prospects on continuous basis.

CRM seems to have the greatest impact on "Amount of prospects per day" as the most arguments are related to this KPI, although also others KPIs, "Average length of prospect list" and "Overall quality of prospect list", are heavily in sight. This influence is caused by CRM's ability to perform internal searches, as discussed in Chapter 4.4.1. Internal search enables faster search of potential prospects as they are already registered in CRM database and less details are needed to fill. This is predessed by CRM's ability to gather all the customer information into the same place and to move from external to internal searches little by little. In turn, availability of prospects already in the system increases a chance to have consistent prospect list on salesperson's hand. Additionally, quality of such prospects in one's calling list is high on average as CRM holds all the notes regarding prospects and those can be easily assessed by the sales staff before taken into one's prospect list.

At the same time, it is also pretty clear that CRM actually has the most effect in stage of prospecting and, therefore, the answer to one of secondary research questions "In which phase of sales process do CRM- systems have the most impact on sales staff performance?" is found, at least in occurrence of arguments. This stage is prospecting, but how CRM actually affects sales person's performance in prospecting? According to analysis of interviews, CRM helps to increase number of found prospects, to make longer

prospecting lists on average and to improve balance towards high-quality prospects in one's portfolio due to CRM's abilities discussed above.

Unfortunately, CRM doesn't only possess positive, but also negative impact on prospecting. Such negative effects turned to be having double customers in the system and limitations in reporting and business information update functions. Those effects are caused by CRM's inability to tell if the prospect with similar name already exists in the system, because there are no warning messages for that and the system doesn't have control on prospect creation. Additionally, there are no direct integrations between CRM and business databases (like Asiakastieto), so all the business information like address, phone, even branch, have to be updated by hand and that, in turn, increases workload of a salesperson. If those details change, no warning message are set in CRM as well, so that leads to obsolete calls and prospects of non-value filling up one's calling list.

On the other hand, it is not easy to judge if the latter are real downsides of CRM, because even without X's CRM, the same problems would occur anyway. Even if Cbook is not a fully perfect tool, it is clearly better than running a sale funnel with paper and pen, thanks to a certain level of automation and streamlining the CRM provides its users with. The theming results indicate that there are more pros than cons and Cbook can be characterized as "simplifier" of prospecting: it provides with quick access to customer information, helps to enter and store the information as well as enables basic reporting and helps to follow one's performance in terms of getting new prospects and improving length and overall quality of prospecting list.

## **6.2 Summary of CRM and booking**

Without booking, there would hardly be any meetings to be converted into deals. Therefore, solid and high-quality booking is just as crucial as prospecting in order to fuel the sale pipeline with new meetings, but also success of this stage heavily depends on available tools like CRM, which seems to have the second greatest impact on booking after prospecting in terms of amount of identified arguments. In booking, numbers have great impact on sales person's efficiency and results. Why so?

After analyzing interview outcomes, one can conclude that booking is a game of numbers, just like prospecting. Booking is a bridge to connect X's services and customers' needs, but it may be pretty hard without presenting these services at first place. However, person who are in charge for recruiting and resourcing, are typically busy and get a lot of calls from various account managers and telemarketers every single day. This affects their mood and state of availability for a call at the moment X's AM or AMT decides to make a next move. This is why it seems to be quite unrealistic to have 100% hit rate of calls per

bookings even with a perfect calling list: a prospect can be busy, in non-buying mood, may be reluctant to take any calls at all, might be out-of-reach etc. In order to get meetings, a sales person must call hard and systematically, because there is always a chance that a next prospect will agree for a meeting, even if previous one didn't. And make a lot of calls. According to results of interviews, in Enterprise X, CRM affects "Amount of bookings per day" and "Amount of calls" the most. Both are the most prominent metrics as both determine sales person's direct success in his/her job (more bookings lead to more meetings and to more sales, accordingly. Even if a sales person holds excellent call/booking-hit rate, he or she will lose to one who has worse hit rate, but makes calls a way more often), although the first KPI has slightly more supporting arguments to have been found. Therefore, CRM has the biggest impact on "Amount of bookings per day"- KPI in booking stage.

According to the results, major impact of CRM on one's performance in booking can be seen in time saving (CRM enables faster booking as there is no need to enter numbers manually; additionally, there are always premade calling lists available so one can start booking right away), enhanced follow-up of booking statistics (Cbook offers nice benchmarking interface to be utilized. For instance, extra motivation to perform better in booking is gained by seeing teammates' statistics) and centralized way to handle customer information (finding contact details for calling and making notes, also usage of customer information to increase probability of successful booking). Also improved way of working (less hurry and fluent process of calling) and ability to show "warm" prospects to book meeting with definitely affect sales person's work in positive way.

However, also some downsides have been found. For instance, the problem of "double customer" persists in booking stage as well and makes it harder to separate real customers from double ones, which causes waste of booker's time. This is caused by CRM's inability to tell if there is a customer with similar name while a salesperson is going through one's list. Also, CRM can even reduce amount of bookings if the system is unavailable when needed. This can be sometimes seen during booking contests, when the system gets overloaded and booking becomes impossible due to slow performance and unavailability of required customer information. Aside problems with technical origins, other problems of CRM are mainly caused by users and can be prevented by proper training and correct way of use. Technically, some fields like contact number and address could be obligatory to fill, because one way to reduce mistakes is to let the system take users' behavior into desired direction. This includes enforcing users to fill in all the sufficient information, so booking becomes easier in longer scope. With all of its downsides, Cbook appears to be a solid tool for making booking easier and theming results have been mainly positive by their nature.

### 6.3 Summary of CRM and meeting customers

After booking a meeting, it is time to complete it face-to-face with a customer. Starting from this stage, impact of CRM has started to decrease. This can be explained by lower amount of arguments found to support KPIs, compared to other stages. On the other hand, it has been expected. Why so?

As it was indicated that one of CRM's most important functions is to provide documentation and knowledge management platform to a sales person (customer information, notes, additional points written by sales persons), it became clear that the most of those functions are to be utilized during prospecting and booking stages, in such stages that don't require physical presence of a customer. In order to complete a successful meeting, a sales person should be well prepared. This can be achieved by investigating customer's profile in CRM and reading all the notes made by other sales persons. If it is about a new customer, not so much information is available in CRM, but still Cbook offers a structured way to gather information from other sources like customer's website and to organize it in form of single entity within customer's profile, that is easily accessible.

Apart of other theming results, almost all KPI occurrences of "CRM and meeting customers" are represented by a single KPI: Meetings per deals hit rate, which indicates, how many meetings have been followed by deals. This KPI is a determining success factor of a sales person, because the main point of meetings is to get a contract with a customer signed. This is why it is so widely represented by a number of arguments. Therefore, this KPI is affected by Cbook the most in this stage of the sales process. According to analysis of interviews, CRM impacts sales person's performance by improving meetings per deals rate and this is influenced by various arguments. Many of sales persons find it handy to utilize Cbook's note-making ability to write down all the details during the meeting or after (this helps to keep all the data in one place and easily accessible), others tell that all the customer information stored centrally helps to improve credibility by asking precise questions and by dominating with extended knowledge of customer's situation now and in past. CRM's ability to support sales person's efforts in preparation of meetings also seems to be a big pro, as one has easy access to the information behind customer profile stored in the system to check it out before going to actual meeting with a customer. As getting deals means sending quotations first, all the details and notes must be available in one place for making a good and meaningful quotation suiting to customer's current situation. CRM makes it possible.

On the other side, Cbook also makes a salesperson vulnerable, because if one makes notes and Cbook doesn't save these notes due to server error, it becomes anything else but not a supporting tool. In worst case, all the notes can get lost and this decreases chances to win a deal, as there is no information to base one's offer on. Fortunately, oc-

currence of such events seems to be low, because this was mentioned by only one interviewed person. Some sales persons found it fascinating to be able to follow meeting statistics provided by CRM, which also affects productivity in terms of adjusting one's doing: if one books meetings pretty well, but only few meetings really take place, it is recommended to review quality of such bookings and to make appropriate conclusions. For instance, one should wait for customer's calendar confirmation before going to meetings. In that sense, CRM is fully manual and doesn't track if calendar invitation has been accepted or not, so it is up to salesperson's responsibility. Additionally, CRM doesn't propose actions for improvement, statistics only, so one has to analyse his/her performance independently.

However, CRM is on its best in case of "old" prospects, because it can supply sales persons with plenty of historical data if a customer was met and known previously. Basically, this means prospecting, booking and meeting so-called "second-round" customers. With new prospects, CRM's ability of information management gets limited to saving recently acquired general information within a customer profile, no historical data is yet available at this point before a meeting for the first time ever (only credit information is available directly as discussed in the following chapter).

## **6.4 Summary of CRM and establishing customerships**

Establishing customership mainly means getting a new customer for a company, that is why this stage only deals with such customers, who have never placed orders at X before. Getting a customer means not only receiving an order, but also signed contract, a document that confirms official relationship between X and its customer. Only after a contract is signed, X can start fulfilling customer's request. Also in this stage of the sales process, CRM plays a vital role as centralized document management system and "thresholder" of non-promising customers.

In this stage, CRM seems to have the biggest impact on number of new contracts per week, at least in terms of gathered arguments: almost all of them are related to this particular KPI. As there is a variety of contract templates for different service types, a sales person has to be extremely precise, but also fast, to find a right template, to fill it out and to pass it to a customer for signing. After, a signed contract has to be entered into CRM and to be converted into electronic format for storing. As a sales person makes several deals per week, his or her earnings straightly depend on number of new contracts and this is why there must be a tool to support contract generation and act as an information storage. Cbook offers a relatively easy way to do that as a sales person doesn't have to maintain thick folders with paper contract sheets and gets access to required templates in no time. Also information exchange with a customer is easier, because contracts can be sent

to a customer in electronic form with few clicks. Among the arguments, the following was also mentioned: CRM offers a structured process of building a customership up with all the guidelines and instructions available to a sales person. This means that a sales person can find contract templates from one certain place, to sign them and to send to a customer according to a pre-defined procedure, which saves a lot of time and effort and allows even more new deals to be handled and new contracts signed. Amount of manual work decreases and a sales person can focus on his/her core duties like prospecting, booking and meeting customers. On the other hand, CRM's ability to store templates can also turn into disadvantage if access to the templates gets corrupted and they can't get extracted from the database for some reason.

However, only a reliable customer is a good customer for X and that is why any customer must be checked out before signing a contract. This involves credit information verification, whose goal is to make sure if a customer doesn't have problems with payments. This information is retrieved from Asiakastieto, a Finnish credit information database, and Cbook offers a direct integration to this database. This means that a sales person can immediately check out customer's credit information and select a correct contract type: customers with problems in their payment history must be invoiced in advance in order to avoid risks and payments losses after customer's order is fulfilled but unpaid. This improves staff's efficient time usage and also impacts satisfaction as sales persons' bonus salaries directly depend on amount invoiced from a customer. On the other hand, as credit information is determining in decision making (whether to sell to customer or not to), it could take place already in stage of prospecting, because all the other steps could be skipped if a customer is not promising at all.

CRM also affects SOV (Sold Order Value) and revenue per customer generated by a sales person. Any stage of the sales process must appear to be credible and smooth in order to truly convince customers: if X is able to offer its customers an easy and credible way to buy, customer are more likely to place bigger orders because of lesser perceived risks (there have been many cases when customers ordered more than agreed in initial meetings, after clearness and speed of contract processing have made their impact on customer). Additionally, a sales person can fulfill customer's order in quicker manner if the whole customership and deal acquisition process, from credit information check to contract signing, is processed and finished as fast as possible. After the contract is signed, a sales person typically passes the order to recruiting and staffing department to be completed. Cbook offers a good way to execute that, as the recruiting and staffing department's members have full access to CRM and customers's orders and profiles as well. To wrap it up and to indicate the most important features of CRM in this stage: CRM helps sales persons to accelerate contract processing, to get immediate access to required contract templates, to check customer's credit information directly from the same system and

to smoothly transfer customer's order for fulfillment. Those, in turn, generate greater number of new contracts as well as bigger SOV- and revenue volumes.

## **6.5 Summary of CRM and follow-up of customerships**

It is a common fact that retaining customer is easier than acquiring them. This can be explained by factors like lowered contact barrier caused by already existing salesperson-customer-relationship, trust generated by successful deals, extensive knowledge of customer's needs etc. Customers appreciate to be remembered and to be taken care of, and that is why follow-up of customerships is just as vital as building them up. As every salesperson has enormous amount of customer to look after, there must be a solid tool to enable structurized and logical after-sale approach to be implemented in Enterprise X.

According to the interviews, CRM seems to be such a tool to support salespersons' follow-up of customers. Availability of customer's historical data appears to be main enabler of "fueling up" active care-keeping of customers. Performance of sales persons in this stage is determined by CRM's ability to hold the customer's purchase and transaction history as well as other information has the biggest impact on SOV New and FOV new-metrics, as success of any salesperson in X heavily depends on how well he or she manages to analyze customerships and to develop a proper sales strategy based on past customer history. For instance, if a customer is executing regular recruiting campaigns of IT-specialists, a salesperson can contact a customer on time, recognize one's demands and ensure availability and supply of best suitable talents to fulfill customer's needs. Also understanding of customer's person and character helps to achieve better results in SOV New as more efficient approaches can be applied: if one knows that a customer is quite precise on expenses, the more cost-efficient services can be offered in advance without nerving the customer. On the other hand, customers with poor payment history can be assessed more carefully in terms of risk, which definitely leads to optimization of customer portfolio as the best ones are taken the most care of. Thus, access to historical customer data can be recognized as the most important feature of Cbook in impacting amount of new-sold and new-fulfilled orders in customers' follow-up stage (for instance, as salespersons and talent search departments make tight collaboration, sharing of historical customer data helps to prepare better for customer's upcoming orders).

Also other effects of CRM have been mentioned. As Cbook helps to plan and schedule regular contacts with customers, thanks to its integrated calendar ability, it is easier for sales persons to stay in touch with members of their customer portfolios, to stay connected. That has major impact on SOV, as activity of sales person increases probability of new orders (customers often tend to be passive and require pro-active approach. Additionally, acquiring and updating information regarding customer's current status is vital

for maintaining CRM). Therefore, CRM supports continuity of mutual sales person- customer relationship.

On the other hand, technical limitations of the system can cause a lot of problems: Cbook doesn't possess alarm ability and this is why all the deadlines set must be followed manually each by each; notes made by sales person can disappear if not saved properly or there is service break in the system; insufficient restriction of user rights can let sales persons to "steal" each other's customers by moving them from portfolio to another. Additionally, dependence on CRM can be fateful if all the contact details are stored in the system that is unavailable at the moment and that is why scheduled calls can fail, decreasing customers' satisfaction. However, proper implementation of such systems and good user training can resolve the most of those problems, although some are there to remain. Still, Cbook offers more pros than coins when it comes to impacting performance of sales persons in positive way.

## **6.6 Suggestions for further researches**

This study has revealed strong connection between CRM-system and performance of sales persons of Enterprise X across various sales stages. Various performance metrics are affected by Cbook on daily basis and all the stages of the sales process are exposed, from prospecting new customer to taking care of existing ones. Cbook is not only a technological solution, but also a driver for more efficient ways of working: instead of wasting time with pen and paper, a sales person can handle his or her customer pipeline with only few clicks, along with enjoying working with nice interface. The research has also described, what are the most vital features of CRM considering each of the sales process stages. For instance, in booking stage those are centralized way of handling customer information and time saving. Also superior significance of CRM for prospecting makes it clear that CRM has the most performance impact in the very beginning of the sales process.

However, the study has also identified downsides and weaknesses of Cbook, which means that the CRM- system is not a perfect tool in its current state and it can damage sales persons' work along with making it better. Some of CRM's weaknesses are related to its technological structure, but others are about user errors. Anyway, all the cons can be fought against, but this requires careful mapping and more detailed analysis, both are missing in context of this research. That is why further researches could focus on identifying CRM's weaknesses, recognizing ways to improve CRM's functionalities in terms of all the weaknesses found and proposing implementation strategy of such improvements



within an organization with CRM already in use. Like in this study, the further researches are proposed to be conducted in form of case study to first close existing CRM gaps within one enterprise and then to share the generated knowledge on more general level to contribute to other CRM researches of similar sort.

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## 8 ATTACHMENTS

### 8.1 Interviews

Interview 1:

Pro gradu- written interview

Interviewer: Vladi Valtteri Parsonen

Topic: CRM's impact on sales staff performance in Enterprise X

Titel of responder: Team Manager

*Theme 1: CRM's functional impacts for user*

**Question 1: What are CRM's impacts on your tasks (prospecting, booking, meetings, establishing customerships, developing customerships)?**

My main task is to work as Team Manager so i carry responsibility for my team's activities. Despite this, i also do Account Manager's tasks that are prospecting, booking, meetings, I build customerships and develop them. Mainly, i would say that CRM has positive impacts on my tasks, lets take one by one. In prospecting CRM helps me to recognize such customers, that are not already occupied and I take such customers to my calling list. Because CRM offers interaction history with certain customers, i can plan taking promotive measures, for instance, I plan my call. In booking i can use acquired arguments to convince a customer and to get a meeting. During the meeting CRM offers useful information, on what i can base my extensive questions to a customer. In the next phase CRM shows me all the previous contracts made with a customer and, basing on these, i can take next steps. Additionally, there is a huge database in CRM, containing guidelines and principles, according to which our company builds customer relationships. Finally, with help of CRM i develop my customers, because i can see customers' purchase history and, basing on this, i can send proposals to my customers. Generally speaking, CRM gives me an opportunity to control my sales pipeline.

**Question 2: What impacts do CRM's visual elements have on your tasks?**

Such elements are mostly graphs and firms' logos in customer information. In prospecting, logos help to recognize firms, in booking graphs show, how many times customer was contacted before me and how many of meetings happened. On meetings, these have no impact, in establishing customerships the only help is red color that indicates customers with bad credit information. These elements have only little impact on developing customerships, almost none, i would say.

**Question 3: On scale 1-5, how important is impact of visual elements of CRM on your tasks? Argue.**

I would say that 2 at maximum, because booking is the only stage where these elements offer some help. Otherwise they have only little impact, i would claim.



**Question 4: What functional features of CRM are the most important from point of view of your tasks?**

Before all, history of customer relationships meaning discussions, interactions, transactions, incoming contracts and customer information are stored and can be accessed easily. For instance, in prospecting this helps me to avoid firms that have been called many times during the year. When i book, i know what to say, thanks to information from CRM. In meetings i can take use of customer information printed from CRM to ask precise questions in cases, when a customer was met before me. When i create customership, CRM's ability to display credit information and payment history accelerates taking customership forward, because one can ensure if a customer is promising or not. I like CRM's benefits in refinement of customer relationship, because CRM holds all the transaction history inside. This helps me in sense that i know what to say to customer in order to get more sales. Personally, i like such a thing that the whole sales process stays inside CRM and it is possible to quickly navigate between different parts of it. Additionally, performance of my team belongs to my responsibilities and CRM shows statistics of team members as well as it helps to compare these statistics to each other and to plan fixing measures.

**Question 5: What features does CRM miss, in your opinion? What could be added, suggestions?**

At the moment, our CRm is good, but some features are missing, for example, that i miss a lot:

1) Possibility to build organization trees, from CEO to operative level. This would help a lot, for instance, with getting information about organizational changes and the tree could be in visual form, from treetop to roots, prospecting and booking would be easier. There is no possibility to add fotos so customers are faceless at the moment, this would help a lot in prospecting, because one would know who he is going to deal with.

2) Another big problem is that one cannot delete customers and they remain hanging in the system, which messes a lot. This makes prospecting significantly harder, because there are lots of doubles in the system and it takes time to clear all the mess.

3) Some sort of interactivity (greetings, summary, ideas?). This would motivate in booking, because it requires a lot of resources, mainly mental ones.

**Question 6: Tell about your experiences related to CRM's integrated analysis tools?**

I use a tool that handles statistics of the week: how much one has sold in meetings, which customers brought the most cash, who is the best of team members and how many meetings were completed. Probably, the most important feature is this possibility to benchmark, so one can easily compare different alternatives and performances of different parts of sales process: how many bookings, how many booking calls, how many new

customer contracts. The analysis tool guarantees certain transparency, because all the numbers are in immediate reach of a hand.

**Question 7: How satisfied have you been in CRM -system?**

I am very satisfied, because CRM integrates all the needed customer information within form of a single system. Before the system, we used paper call lists in booking and information retrieve (prospecting) has been behind hard work every single time. Lets imagine, that we need to quickly find a certain big customer from enormous paper heap, call him and save all the information at the same time: in the past one needed to write this into Word and to put into different files, that was really arduous. CRM also helped to stay connected to existing customers and to sell them more.

*Theme 2: CRM:n mental impacts on user*

**Question 8: How does CRM affect your work well-being?**

I have noticed, that CRM helps in time management and time is the most important resource in my work, i am constantly busy. This means time savings when i manage customerships, prospect, book and go to meetings. In concrete, this reflects in such a way that there are all the needed pieces of information in CRM behind couple of clicks and instead of using half a hour, i only use couple of minutes to do routines. Automatisation of routines has been in big demand in our organization, because these consumed the most time. Now i can focus on essentials: on selling instead of information management. So, with help of CRM i have saved my time and efforts for essentials and do shorter days. For instance, I noticed that CRM enables faster prospecting and this leads to greater booking numbers.

**Question 9: How does CRM affect your professional development?**

With help of CRM , i can compare myself to others and adjust my working in order to reach top results. For instance, CRM shows, which customers are low-profitable, so I get rid of them already in stage of prospecting and I take profitable customers, instead. Thanks to CRM, i book more, so i improve my statistics and earn more money, because bookings lead to meetings and to sales.

**Question 10: What is the most fascinating about using CRM?**

I see it more like support tool, so i cant say this in concrete way. Perhaps the fact, that I don't have to use too much time and efforts for information search, this especially helps in prospecting and developing customerships.

**Question 11: What kinds of feelings does usage of CRM awake?**

Not any at all, the only thing to mention is satisfaction, which is connected to the things mentioned previously. I would add yet, that CRM is a good tool for timing the meetings: i know, when a customer was met previously and i can suggest him the better meeting time.

**Question 12: What meaning does CRM have for you?**

Purely technical significance: it supports my work and helps me to improve my job. Shortly, integrated customer information helps me in all stages of sales pipeline, from recognizing potential customers to extra sales from existing customers.

*Theme 3: CRM's challenges*

**Question 13: What challenges caused by CRM have you seen during your career?**

Unfortunately, CRM doesn't have ability to record speech, so I have to write down a lot after booking, that takes time. Reporting is easy with CRM, but it could be more structured: it should be possible to eliminate free form of report's different parts and to create more structured order, it would help in conducting analysis. For instance, when I am handling my team's week results, I have to do a lot of work to summarize, because people are writing free-formed answers. Turning recordings into text would also fit, in booking I have to write down a lot. Additionally, in case if there are double-customers in the system, I might prospect them by accident and to add them to my own prospect list, after this double client might be contacted by two Account Managers simultaneously, which frustrates a customer pretty much. It is not all yet, every Monday there is booking competition and if CRM is down for a moment, victory is under threat as there is no access to customer information.

**Question 14: Tell about negative CRM-experiences regarding all the work tasks.**

CRM is a system and this means that whatever technical problem reflects on my work. In prospecting, the worst nuisance is double customership, meaning the same customer listed many times, in booking the same reason causes double calls. CRM doesn't have much impact on meetings, only if I have outdated information, but this is more human-originated problem. When I create customerships, I always check credit information and one time CRM wasn't updated and this caused a big mess, because large order was sold to a customer without proper credit information: fortunately, he paid it. What if he wouldn't? I don't have anything to complain regarding CRM and developing customerships.

**Question 15: Tell about useless features of CRM that don't help you to complete your work tasks.**

CRM holds outdated customerships within itself, so there is non-relevant customer information like customers that went bankrupt. Also non-relevant comments written by sales persons overload the system and make it difficult to look for relevant information, for example, in prospecting and checking out customer profiles.

**Question 16: How, do you believe, problems caused by CRM could be prevented?**

Once there was a situation, when I had to quickly contact one regular customer and CRM lagged, so I couldn't talk to a customer, although we have agreed to have a chat. The customer was a little fractious as I didn't call him on agreed schedule, situations like this appeared to some extent. Additionally, another employee moved my customers to his own list during prospecting and they disappeared from my list because of that. Naturally, this

was a human- caused mistake. So, in my opinion, 99 percents of CRM- problems are purely caused by people. For example, prospecting would be more smooth without double customers, that is why is should be possible in CRM to delete customers by users. Additionally, all the updates must be good, it aint funny to book while the whole system is down due to poor update neither customer information can be accessed.

Interview 2:

Pro gradu- written interview

Interviewer: Vladi Valtteri Parsonen

Topic: CRM's impact on sales staff performance in Enterprise X

Titel of responder: Account Manager

*Theme 1: CRM's functional impacts for user*

**Question 1: What are CRM's impacts on your tasks (prospecting, booking, meetings, establishing customerships, developing customerships)?**

The most essential impact is probably this saving of customer information in the system, from which it can be extracted with few clicks. I can say that this easiness of handling customer information must be the most significant impact, because time is saved in all work tasks, especially in prospecting. When i start to develop my current customers, i always look from CRM, what kind kind of purchase history does the customer have and what is status of his/her organization at the moment.

**Question 2: What impacts do CRM's visual elements have on your tasks?**

I dont exactly know what does this mean, but colors are relaxing and balanced, help to concentrate and this affects especially such doing, that i do when i am at the office and sit by the computer so prospecting and booking as well as development of customership are such activities, that are reached by this impact.

**Question 3: On scale 1-5, how important is impact of visual elements of CRM on your tasks? Argue.**

2, because those have relaxing impact, at most.

**Question 4: What functional features of CRM are the most important from point of view of your tasks?**

So, in prospecting the most important is CRM's ability to retain customer information and to offer this immediately to use. In booking, speed is essential so customer's number is pushed into the calling system with one click and call is started. It is also good, that in CRM are all of contract templates and i can confirm them straight in the system, after this CRM works as good platform for "continuous milking" of customer pr, in other words, for making extra sales.

**Question 5: What features does CRM miss, in your opinion? What could be added, suggestions?**

One should be able to delete doubles (useless customerships, that dont exist anymore, in principle). Also differentiation of branches would help, so i want that I could prospect only IT- companies.

**Question 6: Tell about your experiences related to CRM's integrated analysis tools?**

Different KPIs help me, for instance, how many times did i call during the day and how many bookings led to meetings. Unfortunately, the tool doesnt reveal, how many prospects did i gather, it only registers calls, bookings and meetings. In this way, they can be kept number of.

**Question 7: How satisfied have you been with CRM -system?**

Our system is quite good, but technical pauses are sometimes irritating, for instance, i cannot access my calling lists. Though, i am very satisfied with its simplicity to prospect and to build calling lists as well as to call customers straight away.

*Theme 2: CRM:n mental impacts on user*

**Question 8: How does CRM affect your work well-being?**

It decreases stress, because my usage of time makes sense, thanks to CRM. I create lists and call really efficiently, because i don't have to waste time to prepare those, at least no so much. In past, in another company, we used printed lists and it was numb, because fraction of manual work was incredible. Nowadays and fortunately, everything is different and i dont stress so much anymore.

**Question 9: How does CRM affect your professional development?**

Of course, i always want to improve my sales and that is why one has to follow numbers: how many bookings and how many meetings, how big percentage of those led to deals and what I could do in different way. Everything starts with amount of calls and it has to be measured, CRM is a fine mean to do that. I can say that CRM advances my development by providing me with tools to control my dong.

**Question 10: What is the most fascinating about using CRM?**

Its easiness and clearness fascinate me, on the other hand, these are also challenges, because there is no delete function to delete old prospects, for instance. I like to prospect particularly via CRM, because many high-quality and already contacted prospects can be found from there and it is easy to get easy bookings from them.

**Question 11: What kinds of feelings does usage of CRM awake?**

It doesnt really awake, the head is full when i am busy with CRM. Maybe satisfaction, that this kind of system exists.

**Question 12: What meaning does CRM have for you?**

In prospecting and booking, it is my right hand, good and versatile tool. Also in meetings, i keep it open and write down all the things said by a customer, this is my style.

After this, i extract contracts from the system, confirm them and sell more to a customer, basing on old information.

*Theme 3: CRM's challenges*

**Question 13: What challenges caused by CRM have you seen during your career?**

Endless cut-outs, when all of us are calling at the same time, maybe overload might be guilty for that? Updates have failed many times and doubles are present in vast numbers, which makes prospecting slower and harms bookings, because many Ams are calling to the same customer so information doesn't always move around.

**Question 14: Tell about negative CRM- experiences regarding all the work tasks.**

Prospecting: doubles and impossibility to remove those.

Booking: customer profile was entirely empty, i didnt know where to take a grip while talking to a customer.

Meetings: no problems, so far.

Closing deals: updated contract templates were missing when our pricing has changed, it was embarrassing to admit this in front of a customer.

Extra sales or followup of customership: once, the information wasnt saved so i had to begin everything from the start, I had a bad feeling.

**Question 15: Tell about useless features of CRM that don't help you to complete your work tasks.**

I cant figure such out, maybe only pop-ups that come to upper corner, and it is hard for me to switch them off immediately.

**Question 16: How, do you believe, problems caused by CRM could be prevented?**

CRM must be updated better and tests must be run, because nowadays those are made chaotically. People could also pull oneself together and write only relevant comments into customer information instead of things that popped first into one's mind, it is "nice" to read that one talked with customer about dogs instead of work topics, company's business etc.

Interview 3:

Pro gradu- written interview

Interviewer: Vladi Valtteri Parsonen

Topic: CRM's impact on sales staff performance in Enterprise X

Titel of responder: Account Manager

*Theme 1: CRM's functional impacts for user*

**Question1: What are CRM's impacts on your tasks (prospecting, booking, meetings, establishing customerships, developing customerships)?**

Very good question. In fact, in my opinion, CRM's main task is to keep all the customer information within and to provide with effortless access whenever. In prospecting the impact is at the biggest, because this magical forging of sales really starts from it. For

instance, in prospecting i can leave bad, not-promising customers and save great amount of time, that can be used for booking. In booking CRM is opened all the time and there i save all the information received from customer, impact make it easier to write and manage customer information, because after this, information can be found from the one system. In my opinion, CRM doesnt have dramatic impact on meetings, because there it is about being face-to-face with a customer instead of “digging” a notebook, but CRM gives a considerable introduction to meeting. This comes out in such a way that i can explore a customer and communication history before the meeting and this helps me to be one step before a customer in meeting situation. Customer relationship is born by closing and all the required contract templates are in CRM, so it works as a documentation tool. When i develop a customer relationship, in practice i look at all the interactions with this certain customer in the system and, basing on this, i recommend a customer how to to move on with new orders, for example.

**Question 2: What impacts do CRM’s visual elements have on your tasks?**

Our CRM is slightly bad, because visuality isnt highlighted that much. Only single logos of companies flash by sometimes and background color is green, which relaxes. Visuality doesnt really affect my tasks in any way, during my career i have been using various similar systems and results have been about the same.

**Question 3: On scale 1-5, how important is impact of visual elements of CRM on your tasks? Argue.**

Maybe 1, because they dont affect my revenue and margin development, that are the most important KPIs, at least to me.

**Question 4: What functional features of CRM are the most important from point of view of your tasks?**

System’s ability to hold integrated and focused customer information within it and easy access to it are the biggest triumph. In prospecting it is the most important to use filter functions, with them i can eliminate all so called one man- companies and reserved customerships, additionally, CRM shows when a customer was contacted previously and it predicts to long extent if it is worth to put time into some customership. When i book, the system is quite fast to move between different tabs, so i can quickly access a calender to reserve a meeting with a client. As i said before, CRM doesnt affect meetings that much, but affects closing, because all the contract templates are there. When i develop already existing customership, i base my decision on customer’s history.

**Question 5: What features does CRM miss, in your opinion? What could be added, suggestions?**

I like the current system, but probably possibility to remove useless customerships would be cool. Because CRM isnt straightly integrated to Kauppalehti, for example, i have to create many customerships by hand and this is time-consuming. If CRM could

update its customer information straight from company registry, it would be great in prospecting stage. Unfortunately, CRM cannot separate branches from each other and that is why i desire this filter feature.

**Question 6: Tell about your experiences related to CRM's integrated analysis tools?**

I dont use these that much, except when i look at statistics by the end of a day: how many meetings did i book, how many calls did I make and how many meetings did I complete. In booking competitions i especially can follow my numbers, so in booking these tools are important, but i am unsure if they are important in other tasks, because I use them so rarely.

**Question 7: How satisfied have you been with CRM -system?**

Generally speaking, i have been quite satisfied, because CRM helped me to manage customer information and, thanks to CRM, i got an opportunity to focus on important issues like sales themselves and taking care of customerships. With help of CRM i get more bookings, more high-quality prospects and more sales because of time saving.

*Theme 2: CRM:n mental impacts on user*

**Question 8: How does CRM affect your work well-being?**

The largest stress factor in my work is continuous hurry and CRM can temper it. As i said mefore, sometimes hurry originates from insane amount of work: one must prospect new names to have enough to call, one has to book and to immediately go to meetings in order to avoid loss of sales... Everything starts from customer information and customer history, that are found from the same place when i need them the most. Because CRM saves my time, i can spend more time with my family and to go drinking beer with my friends instead of sitting in the office.

**Question 9: How does CRM affect your professional development?**

My goal has always been to become top salesperson and this manages only if i set myself goals to book the most and to meet the most, getting the biggest sales. For that i need statistics that reflex results of my work. With help of results, i can control my actions on continuous basis. For instance, if I see too few bookings, I book more.

**Question 10: What is the most fascinating about using CRM?**

I cannot really say, because in itself, CRM is not fascinating, it is more about being useful toolbox.

**Question 11: What kinds of feelings does usage of CRM awake?**

It awakes happiness, because i know to get along easier than many salespersons in other companies (in many they dont even have such systems). Usage itself is quite neutral in terms of feelings.

**Question 12: What meaning does CRM have for you?**



I consider CRM to be my little helper, especially in prospecting and booking, because it replaces telephone books and notebooks. Its significance grows with increasing benefit ratio of sales and consumed time. Overall, CRM is splendid tool for me, that retains customer data and helps to take benefit of it in controlled way in all my tasks.

*Theme 3: CRM's challenges*

**Question 13: What challenges caused by CRM have you seen during your career?**

Technical pauses in booking competitions, for instance, have been fateful, because suddenly, we couldn't access calling lists anymore. So, purely problems with technical origins as breaks, failed updates, messy prospects (there are many notes made by salespersons and that are irrelevant), customerships without contact information. (it is "nice" to call such customers while booking).

**Question 14: Tell about negative CRM- experiences regarding all the work tasks.**

In prospecting, so called "hanging" customerships (bankrupt, one man- companies and those without credit information) became the biggest troubles. For some reason, these cannot be removed and cause doubles, so prospecting is getting harder all the time, because new sales guys make mistakes and create already existing customers many times. When i book, previously mentioned missing contact information is irritating, because without them i waste much time to complete them instead of booking. Still, it doesn't affect meetings neither building customerships, because CRM has always hold all the contract templates I needed. Once, there was a funny situation, when i tried to get extra sales from my already existing customer and someone of new salespersons moved the customer to himself and already called the customer to tell being a new contact person. The customer was quite surprised, but this is more such a mistake made by human.

**Question 15: Tell about useless features of CRM that don't help you to complete your work tasks.**

Irritating pop-ups, when i prospect and add customer to my list. I cannot remember something else immediately, because our system is quite simple.

**Question 16: How, do you believe, problems caused by CRM could be prevented?**

I believe that CRM's problems can be resolved with profound user training, especially related to booking. It is not to add useless comment to customer information and customer interactions have to be described in such a way, that also the next one would understand what it is all about. Because updates and maintenance work often happen in the middle of the day, i hope that they would be made during night, for example, outside our working hours.

Interview 4

Pro gradu- interview

Interviewer: Vladi Valtteri Parsonen

Topic: CRM's impact on sales staff performance in Enterprise X

Titel of responder: Account Manager

*Theme1: CRM's functional impacts for user*

**Question1: What are CRM's impacts on your tasks (prospecting, booking, meetings, establishing customerships, developing customerships)?**

Allright, need to think for a moment. Ok, if one considers prospecting, it is the most important to have something to call on the list. Do you remember, when i run out of prospects and i had to quickly prospect more to make things run? CRM garantees, that i get the lists done and although i dont find prospects from there, at least i get them registered there and can call in focused way without letting my attention away. When high-quality prospects are found from the same place, it means that also booking is fluent, because number of bookings grows as consequence for high-quality prospecting. When we thing about the whole chain, the most central idea of prospecting is to get meetings happen. There must be good tools for booking and, in favour of our Cbook, I must mention its call feature, so when I click customer's number, it connects me straight to the customer. One can also put there everything that comes from the other side of phone, so this is ok tool for forming up customer profiles. In meeting i dont really use CRM that much, there is not enought time and i dont dare to twiddle the system when i discuss with a customer and focus on his challenges. Of course, i could make notes also in other way than simple writing into notebook in meetings, but this requires adaptation yet, because laptop on the table is probably a little bit uncorrect towards the customer. After the meeting i always create customer profile into the system and attach contract template to it if it appears to be type with "promise". When i handle extra sales, it is cool to look at CRM and customer profile, what sales was made with them before, how well has a customer paid his bills and what kind of employees has he searched generally. I coud crystallize in such a way, that from CRM one can find all the information and access is easy.

**Question 2: What impacts do CRM's visual elements have on your tasks?**

If you mean appearance, i cant really form it. CRm is nicely green and maybe jungles or something like this pop into my mind, I like to dive into it over again. I could , in fact, tell you that when i used it for the first time, i got inspired to book because i had read the book about fan shui and its colour world was just as relaxing and helping to focus, later the experiences have been the same so this somehow reflexes in booking numbers. On the other hand, because our CRM is so simple, there is nothing else but only white and green background, i cant really tell anything else. There could be more something cool like useful pop-ups, tips etc.

**Question 3: On scale 1-5, how important is impact of visual elements of CRM on your tasks? Argue.**

Isn't it something like four, because for me, colours have significance as I already mentioned in the previous question. Since a small child, I have always liked green and in Cbook, memories of childhood awoke to life. I think that green stimulates my brains and helps to achieve desired results, somehow I have this feeling. So, strong four.

**Question 4: What functional features of CRM are the most important from point of view of your tasks?**

So, I could tell you that the information held by CRM is its most important ability, so it works like database and interface to a customer. When you think that you need to quickly find some customership and, for instance, to check if its information is correct, Cbook offers a shortcut for that. I like that CRM helps me to book, because I instantly get customer profile open, check that he wasn't called before me, after ending of call I write all the observations into the profile and go to meeting with hands full of jokes. Transparency of customer information is the biggest trump, I would say. What else, at least I get a hell of boost when our boss goes through all the week statistics and I am the first one from one week to another. This helps to call and to book more and this really reflexes in big deal amounts. And because my task is to make sales, CRM helps with it through the booking. Everything can be seen in revenue and in sold order values, can't it?

**Question 5: What features does CRM miss, in your opinion? What could be added, suggestions?**

Can't figure anything else out except getting rid of doubles. Something like this...

**Question 6: Tell about your experiences related to CRM's integrated analysis tools?**

I view it on regular basis, because by us, sales statistics are handled in every week- and team meeting, for example, how well went it regarding prospecting, how much books did we get, how many customers were met and to continue. Just on the last week agenda of the week was monthly sales and it was seen in CRM right away, so Cbook gives a good framework for following one's doing in form of this tool. In reality, I have been quite satisfied with the tool, because it helps to compare my performance with ones from my teammates and certain will to win is being born, especially in booking, calling and meetings, so it helps to press at fullest.

**Question 7: How satisfied have you been with CRM -system?**

Our system has been quite ok, because without it I wouldn't have my right hand, so to say. If we consider, how did salespersons make it in the past, I really pity them. Nowadays, one doesn't need to wonder with paper piles, because it is easier to open the computer and login to Cbook. I like the most CRM's ability to support my booking and prospecting at least in numbers, because these stages must be good, so to speak. I have been extremely satisfied, one will see if they find out something new gimmicks, let's see if they are good or not, hahahah.

*Theme 2: CRM:n mental impacts on user*

**Question 8: How does CRM affect your work well-being?**

Ah, ughh... In work, the biggest challenges are those hustle and result goals, they cannot really bend. Cbook is such a stuff that i can forget these mentioned above and my working gets some sort of order, so i do better at work. It is especially important in booking, because by us, we have certain amount of bookings that must be reached every day. CRM almost guarantees, that i reach that amount and i dont need to stress for nothing. Additionally, it is lovely when i am lifted to board of honor every Monday (only such people, who booked and calles the most, can get there). It is more pleaseful to be at work when amount of respect increases, this is fact. Such...By us, it is often talked about work wellbeing via sport, for instance, we have floorball groups and if you dont take part although you have registered, this awakes wondering glances like "why don't you have time to play with us". Because of hustle, and CRM removes this problem at least partially by its side, now i have time to participate and to take part in gang's common moments, which is cool.

**Question 9: How does CRM affect your professional development?**

Allright, so i have set my goals to become the best salesperson in house i must to make a hell of sales. Because Cbook makes my work more efficient, i get at first place in new sales, for instance, so i get the most new customers and with time, I ll get the most extra sales, I bet. Because i certainly have certain mindset ( i grow up with my customers), CRM helps me to stay upon customers' skin and to recognize needs when it is a good chance for extra lses, for example. So simple: when i make sales, i become more solid salesperson. And, of course, its is good that Cbook helps me to grow up as a booker and at the moment,i book the most of us in our organization. Hahah, i bet that everyone of us can become sold salesperson with good tools and thanks to our new system, our Sales Assistants book well. Before, it was like made with paper-style and one got maybe one booking per day because didnt have time to use his time right. It is really important when one books meetings for me, because meeting statistics patter into my chest anyway, so without good supporting system i would never get to my goals, that are quite hard, ultimately. So...

**Question 10: What is the most fascinating about using CRM?**

Yes, so beautiful is simple and in CRM it is the best that it doesn't contain anything excessive. For instance, in many softwares, i have hated multilevel structures and endless submenus, but in Cbook there is only one main page and everything is found from inside, this is quite ok. The most fascinating thins is probably, that is shows how well the day went regarding bookings and meetings (that are our major criterions). For bookings, one gets bonuses and even without sales, meetings make "moneybag" thicker, nothing else to say.

**Question 11: What kinds of feelings does usage of CRM awake?**

Ahh, this is the hard one...Hmm... Ok, probably this satisfaction, because of fact that there is good software to manage customerships. Do you remember when after booking competitions some of teams got the most bookings and money prizes based on this? So, in reality, number of bookings and calls can be compared to feeling of success, nothing else in mind at the moment. So, maybe additionally also systematic way of doing feels safe and CRM provides with good meals to follow it, because there is a certain process to follow along and it is hard to diverge from it.

**Question 12: What meaning does CRM have for you?**

I consider it to be such a invisible helper so it doesnt expecially show in other way than in background. If Cbook fails, i am in trouble when i cant contact the customer neither can agree on a new meeting if I simply cant find customer's profile without CRM. A bit hard question, because i only rarely think about system's role, in general, it is only such a mean to reach my goals... As one would think about glass while drinking water from it. But i consider it as a top-one tool for prospecting and booking and without it, i would never get to the point where I am at the moment. It is a small helper of me, i could say.

*Theme 3: CRM's challenges*

**Question 13: What challenges caused by CRM have you seen during your career?**

Allright, now we got straight to the thing, so our Cbook also has bad sides, haha. I am so tired with those doubles, for instance, when you are calling to a customer, he says like "I was already called by someone in your firm". Then i am like, what has really happened here? This is caused by doubles, on other words, the clients that exist in many exemplars in our system. They cause confuse, when the customer is called by many Account Managers, it is not cool. They cant really be deleted from the system and this makes prospecting harder later, when one doesnt know whether the prospect is right and potential or not. Then, another thing is booking contest, this has been critisized widely in every corner of our organization. When the contest starts, we have to call as many times as we can and to book at the same time and it is exciting, when in many cases Cbook crashes as consequence of overload and one can see error in the screen... Sometimes it feels that it would even be faster with paper templates, but of course, it is useless to generalize, in Cbook there is more of benefits than downsides. Personally, i would purchase better servers and these crashes would end, because this system is being used in all countries we are present in, so it is no wonder that is "falls" all the time". Maybe, there is nothing else.

**Question 14: Tell about negative CRM- experiences regarding all the work tasks.**

So, there come probably the same things as previously. The most critical of all is the prospecting- booking axis, so if in this spot things go wrong, this breaks the whole process. Mainly, if one considers prospecting, doubles fill up the calling list only seemingly, and when one starts to call, dismay is huge when one realizes that roughly every second prospect is bad, in booking this becomes visible and endless breaks annoy, when one tries

to call along the list. So, as i said, mostly these doubles and pauses cause dismay. Additionally, when the gang steals my customers (especially rooks do), because in Cbook one can drag prospects from another's portfolio to his own and this annoys, because information about existing customers suddenly disappears. Something like this, and personally i would equip reserved prospects with some password. Also template-related problems occurred too, because once template model i ve saved has disappeared and i couldnt find a replacing one, so i had to search somewhere else. That excited a lot, without doubts.

**Question 15: Tell about useless features of CRM that don't help you to complete your work tasks.**

I cant even come up with them, , haha, there has been so many of them. Ok, maybe this "farming" of doubles is frustrating and makes my work harder, as I have already said. Then there is really irritating part, when big summary of all teammates' notes like reminders, agendas of meetings etc, appears on the screen. Still, i didnt find a way to get rid of those and to see only things related to me, it could be something like this. At the moment, i cant come up with more by force, the system plays well when one can withstand some small issues. Yes, and one big troublemaker is at least this "devil of popups"(for example, the error comes when one creates customers in wrong way, the big red one, after which the screen freezes for some seconds). Nothing else, really.

**Question 16: How, do you believe, problems caused by CRM could be prevented?**

I guess that if we could get the system into condition in technical sense, everything would be alright. The idea is brilliant, you make bigger booking numbers and prospect efficiently and you hold all the wires while selling more and getting more customers. But when the system doesnt often obey and crashes or the information is being even erased, this discourages. Personally, i bet that when everyone use one server and it crashes, it can be fixed with bigger capacity or something like this. Of course, also features of Cbook can be polished, so the possibility to remove doubles would be cool and many have already told this, but nothing has come back from Sweden, so far. Lets wait the better times, one cant do else.

Interview 5

Pro gradu- interview (littered from audio)

Interviewer: Vladi Valtteri Parsonen

Topic: CRM's impact on sales staff performance in Enterprise X

Titel of responder: Account Manager

**Q: so, the first theme: CRM's functional impacts to user? And questions comes as following: what are Cbook's impacts on your tasks, that are prospecting, booking, meetings, establishing customerships and customership development.**

R: Well, in practice, generally Cbook is salesperson's most important tool, so without Cbook salesperson's actions would be so much more complicated. In practice, we put everything, all the reports on Cbook, was it meeting, call or follow-up, everything can be found from there. So, Cbook is my most important tool in work.

**Allright, so question two: what impacts do Cbook's visual elements have on your tasks?**

V: Visual elements mean like...ok, well, probably i didnt pay that much attention to to visual elements, it is more about system's agility in main role. But, of course, i wouldnt see that visualization has big significance for me, in fact, i have never discussed with myself about significance of visualization. Personally, i think that it doenst have any significance to me.

**K: Question three: on scale from one to five, how important are impacts of Cbook's visual elements on your work tasks? Justify.**

V: Well, in this recent cut i said, that for me, visual impact of the tool is not any first thing. From one to five, it is two for me, i would say.

**K: Question four: what functional features are the most important from point of view of your tasks?**

V: Functional features, so i would say that this agility without doubt. So, like, the system works and by "working" i mean that the system doesnt block me out anytime. So ,for example, i can write long reports and the system saves them for sure, also there shouldn't be any troubles, so i would say that agility is the most important criteria in the system to me.

**K: And how, for instance, in booking, how does CRM help you in that?**

V: Well, absolutely, there i can write down notes as easily as possible while calling to a customer, so i can as easily as possible write to comment fields everything what we have discussed with a customer.

**K: Good, thanks. Question five: what features do you still miss in Cbook? What misses, suggestions?**

V: Well, all right...Still, i dont have that much experience in ERPs, it is hard for me to say something certain, because it is like I don't have any comparison basis to other systems...Well, i am just trying to think what is really missing...Well, there is probably the thing in the system that sometimes we easily get these "double customers" so it is hard to remove them, so in practice if there are two same customers, it is impossible to remove thsesse customers from the system. Thats why double customers remain in the system easily...

**K: Question seven: generally speaking, how satisfied have you been with Cbook?**

V: Well, generally speaking i have been really satisfied, but there is also something to develop in the system, i dont actually consider it to be the most agile software of all, it

has such a problems that sometimes it blocks me out, but as a basic sales system, it is quite a working system to me.

**K: Yes, and what do you mean by something to develop?**

V: Well, it is about customers that cannot be removed, and also that the system blocks me out. It means that all the texts you have written are lost on desktop, so this has been the biggest issue for me.

**K: Exactly. Allright, we have gotten to theme two, so CRM's mental impacts from user's point of view. Question eight: how does CRM affect your wellbeing at work?**

V: Quite a hard question, haha...

**K: For instance, how does it affect your time management?**

V: Well, i tell that if there was no system, it would have negative impact. So, practically, my time management would be hard without the system, i believe. So i dont rellay know if i ever could manage my time without the sales system, so it is like obligatory part of active selling, in my opinion, so there should be a sales system. Such a big impact.

**K: Question nine: how does Cbook affect your professional development?**

V: Yes, it impacts a lot. If you think, what of does our selling or what of my professional sales success consists, it consists of booking meetings, meetings themselves and reporting, and all of those are in straight connection to Cbook. So, practically, Cbook has enormous impact then, because it holds everything: what have I discussed with customers about (all is in one place), pricing, introductions of candidates, practically, the whole sales process, from the very first booking to the moment when the right candidate is found. All of those are found from the same system, so I would sys that impact is significant.

**K: And question ten: what is the most fascinating in usage of CRM?**

V: In my opinion, when i thing about word "Fascinating", maybe in this system such a thing would come up that from the system, i can find everything my former and current colleagues, who visited the same customers, have written. So it fascinates that i can find historical data that helps me to succeed in customer meetings and sales, these are such things.

**K: Ok, question eleven: what feelings does usage of CRM wake up in you?**

V: Well, probably the fact that all the information can be found from the same place, so feeling of safety is the first one to come up, because i know that i will find previous discussion from there. I would say that feeling of safety, at this point.

**K. Question twelve: what meaning does CRM- system have for you?**

V: Well, for me, meaning of CRM is huge due to the reason i stated previously, from there all the information can be found so i can manage in my sales job. So, the fact that everything i have talked with my customer about is within the sales system, especially regarding active sales job. So CRM's role is to act as note holder and to be between my own sales notes, so CRM is really significant for me in order to be successful in my sales job.



**K: Question thirteen: what CRM- caused challenges have you come across during your career?**

V: Well, the biggest challenges that i have seen in my own personal work, are related to the fact that the system has blocked me outside when i have been writing comments into fields about bookings and meetings. The program has suddenly blocked me out and i had to start the writing over, it is the biggest issue. Then , it is again about the identical customers, so the risk is that if there are completely the same customers, they can be accidentally contacted twice, or customer profile contains the same information as another profile does, so i would say that these three mentioned previously are the biggest challenges I have ever faced in usage of the system. Additionally, a mobile application worked really badly at least by my side, i needed to login in over and over again and i couldnt get all the information from mobile version compared to computer version. So, i would raise these four up, i didnt face any other challenges in my personal sales work.

**K: Tell about your bad CRM- experiences regarding all your tasks(prospecting, booking, meetings, establishing customerships, and follow-ups of customerships).**

V: Yes, in prospecting the worst thing to come up is that there are many of double customers (same companies under the same registry), i have created such customers myself, too, because i imagined that they are not there, so this is bad. Additionally, the fact that even with phone number or registration number i wasnt able to check if such customer already exists, comes up to be the first bad thing in prospecting. And, well, in booking such a fact comes up in bad way that when a customer says that he has a colleague, colleague, well (?)... Or when i call back to customer, i have called him, and he calls me back and i cannot find him basing on phone number at all, this is really bad, because I have to find it separately with Finder. Then, well, what is bad in meetings for me, probably the fact that when i register the meetings i have mentioned previously, and have written a long comment, sometimes the system has blocked me out from there and I had to start writing over into the system, so this is one bad thing. And then, in followup this is bad that the system is like very clumsy and it will never alarm if i didnt do followup until certain deadline, and this just remains. I would say, these are the bad sides i have encountered professionally.

**K: And the next question: tell about useless CRM's features, that do not help you to perform well in your tasks?**

V: Well, useless features are represented by those double-customerships, what we have recently talked about. Right now, nothing else pops up in my mind. Double- customerships are those.

**K: All right, and the last question: what do you believe, how CRM-caused problems could be prevented?**

V: Yes, at least so much useless work could be avoided if everyone would use the system as carefully as possible. There is a problem that this is more time-consuming, but

i believe that in longer run it would make sense, for instance, when one creates new customers, it should also be verified with contact name if the contact name is already connected to other customerships, so doubles won't be created. And, generally speaking, careful usage of the system, by this i mean these comments that should be written as abstract as possible, and they should also be business-related and they provide a next salesperson with as many tools as possible to get forward. And also, what kind of challenges have been there, so one can already discuss about them with himself "Did something in our actions change?", and there is possibility that one can understand these challenges much better and find the arguments, why customer should take a meeting with me right now if he didnt want to do it before...

#### Interview 6

Pro gradu- interview (littered from audio)

Interviewer: Vladi Valtteri Parsonen

Topic: CRM's impact on sales staff performance in Enterprise X

Titel of responder: Sales Assistant (Account Manager Trainee)

K: Alright, good day to you, too. And yes, today we do this interview, whose topic is CRM's impact on sales staff performance in enterprise X. And lets start from he first theme, which is about CRM's functional benefits to user. To get started, could you please tell about your titel, what is your official work task?

V: Alright, so i am Account Manager Trainee by Academic Work and i prospect and book meetings.

k: Yes. So, the first question, what are CRM's impacts on your tasks, that are prospecting and booking in your case? So, how is Cbook, what impact does it have?

V: Hmm, so Cbook, at least it makes my working so much more efficient, it gives me such an interface that helps me to create calling lists, to keep a book to whom have i taken contact, to whom have my colleagues taken contact and it also helps me to rank different firms as i see what they have responded, what have they said and is it worth to take contact to these people. And this is why it is good, because from there, one can see straight contact information and persons and everything is like in the same bundle.

K: Yes, thanks. And question two: what impact do CRM's so caled visual elements have on your tasks?

V: Well, of course, the clearer, the easier. I like our CRM system, because it is really clear and calm, but...Yeah, it must be clear enough and if it is not, then it is not efficient. But after it has reached a certain point of being clear enough, after it is only about being delightful for eyes, in my opinion, but on the other hand, i dont know if this affects my working in any dramatical way.

K: And question three: on scale from one to five, how important are impacts of CRM on your tasks, about what we have recently talked?

V: Well probably, probably it is three, three, i would say, because just like i said, there must be a certain border in clearness, if it is exceeded, CRM works well.

K: Yes, and question four: what functional features of CRM are the most important to your working, for instance, in prospecting?

V: In prospecting the most important is that company database is broad and has much content, and that search system is made well, so i can fluently limit my search and it gives me relevant and updated search results.

K: Yes, and what about the functional features affecting your booking, when you open a calling list and start calling, is there any concrete impact of CRM compared to a situation, when you would just grab phone book and start to call?

V: Of course, it is much simpler, i only need to click a number there or a name and it takes me straight to call, it is much simpler.

K: Yes. And what kind of features do you still miss in CRM, what misses, any suggestions?

V: There seems to be a lot of doubles and old, non-updated contacts, it would be good to get them outta here.

K: Yes. And then question six: tell about your experiences regarding integrated analysis tools of CRM?

V: I didnt use them that much, but at least it tells how many calls has one made and how many bookings, so it helps me to follow up my development and working.

K: Yes. And question seven: generally speaking, how satisfied have you been with CRM- system?

V: Satisfied, by the way, but maybe i am not satisfied to presence of multiple doubles and outdated contact information.

K: Yes. Then, theme two: CRM's mental benefits to user. So, question eight: how does CRM affect your work wellbeing?

V: So, of course, it makes it clearer and easier to do my job and with that it helps with work wellbeing.

K: And question nine: how does CRM, so to say, support your professional development?

V: Probably the fact that i can see statistics from there and am able to read old people's comments and calls, so it develops me.

K: And question ten: what is the most fascinating in using CRM? Can you see anything fascinating?

V: Well, in my opinion, it is quite fun to see old calls and how did they go, and also these statistics, so basically it is about the same, statistics and old calls are fascinating.

K: Yes, and question eleven: what kind of feelings does usage of CRM wake up?

V: Sometimes a little bit of frustration, but only positive otherwise.

K: But why frustration?

V: Because i ve contacted double that wasnt marked as double or that wasnt deleted.

K: Alright. Yes, and question twelve: so, generally speaking, what kind of significance does CRM-system have for you: do you see it as a bare tool or is it about something bigger, possibly?

V: I dont see any feeling ties, really. For me it is only a tool.

K: Alright. And then we have the last theme: CRM's challenges. Question thirteen: what CRM-caused challenges have you seen during your career?

V: Well, already couple of times i have called to such companies that are already owned by another Account Manager and that is why there are double marks in them.

K: Yes, and then question fourteen: tell me a little bit about those bad CRM-experiences regarding all of your work tasks. For example, you said that there are many doubles but has there also been something else as well? Because i have interviewed other Account Managers and they told about this booking contest, have there been problems during the contest?

V: Ah, yes. Yes. Quite often, i have been working here for two-three months and the system has crashed already many times, that's it, of course. And also old and outdated contact information is a problem, in my opinion.

K: Yes. Question fifteen: tell about so-called useless features of CRM, that dont help you to make it through your work tasks, does it have something useless?

V: Well, i cant figure anything useless to be there right now.

K: And question sixteen, it is the last question, by the way: what do you believe, how CRM-caused problems could be prevented?

V: Well, with using enough time and effort so CRM stays updated and i dont know, somehow these crashing problems must be taken care of.

K: Yes, and do you have any comments yet regarding the doubles?

V: Yes, they should also be removed from there as soon as they show up, they should be deleted entirely.

K: Yes, Hey, thank you for the interview and i wish you luck with the future and many thanks, once again.

V: Thank you very much.

## 8.2 Interview questions in Finnish

Teema 1: CRM:n toiminnalliset hyödyt käyttäjälle

Kysymys 1: Mitkä ovat CRM:n vaikutukset tehtäviisi (prospektointi, buukkaus, tapaamiset, asiakassuhteen luominen, asiakassuhteen kehittäminen)?

Kysymys 2: Millaisia vaikutuksia on CRM:n visuaalisilla elementeilla tehtäviisi?

Kysymys 3: Asteikolla 1-5, miten tärkeitä ovat CRM:n visuaalisten elementtien vaikutukset tehtäviisi? Perustelee.

Kysymys 4: Millaiset CRM:n toiminnalliset ominaisuudet ovat tärkeimpiä tehtäviesi kannalta?

Kysymys 5: Millaisia ominaisuuksia kaipaat CRM:ssa vielä? Mitä puuttuu, ehdotuksia?

Kysymys 6: Kerro kokemuksistasi liittyen CRM:n sisäänrakennettuihin analysointityökaluihin?

Kysymys 7: Miten olet ollut tyytyväinen CRM- järjestelmään?

Teema 2: CRM:n henkiset hyödyt käyttäjälle

Kysymys 8: Miten CRM vaikuttaa työhyvinvointiisi?

Kysymys 9: Miten CRM vaikuttaa ammatilliseen kehitykseen?

Kysymys 10: Mikä on kiehtovinta CRM:n käytössä?

Kysymys 11: Millaisia tunteita herättää CRM:n käyttö?

Kysymys 12: Millainen merkitys CRM- järjestelmällä on sinulle?

Teema 3: CRM:n haasteet

Kysymys 13: Millaiset CRM:n aiheuttamat haasteet olet nähnyt urasi aikana?

Kysymys 14: Kerro huonoista CRM- kokemuksistasi liittyen kaikkiin työtehtäviin.

Kysymys 15: Kerro turhista CRM:n ominaisuuksista, jotka eivät auta sinua suoriutumaan työtehtävistäsi.

Kysymys 16: Mitä uskot, miten CRM:n aiheuttamat ongelmat voitaisiin ennaltaehkäistä?



