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CRM – increasing customer knowledge

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Thesis abstract

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The purpose of this thesis is to identify how Serres Oy is able to utilize and to develop a more efficient customer relationship management system at its three business unit's Sales & Marketing, Nemo and Nautilus.

The theory of the thesis consists of sales management, relationship marketing and customer relationship management from business-to-business point of view. Emphasis of the theory is on customer relationship management in order to support the empirical and development part of the thesis.

Semi-structured interviews were conducted to have an understanding on what kind of customer information Serres has, and how it is collected, stored and used as well as to see what role the customer relationship management system has. Two system users were selected for the interview based on their positions at Serres, one from management and one from among sales personnel.

Based on the interviews, the author selected as the main targets of development user engagement, customer segmentation, use of CRM in product development and information flow between different systems. The author has presented suggestions for improvement for these areas.

Keywords: customer relationship management, CRM, sales management, relationship marketing

SEINÄJOEN AMMATTIKORKEAKOULU

Opinnäytetyön tiivistelmä

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Opinnäytetyön tarkoituksena on selvittää, miten Serres Oy voi kehittää entistä tehokkaamman asiakkuudenhallintajärjestelmän sekä hyödyntää sitä kolmessa liiketoimintayksikössään Sales & Marketing, Nemo ja Nautilus.

Teoriaosuudessa käydään läpi myynnin johtamista, suhdemarkkinointia sekä asiakkuudenhallintaa business-to-business näkökulmasta. Empiirisen- ja kehitysosion tukemiseksi teoriaosuus painottuu asiakkuudenhallintaan.

Teemahaastattelujen avulla selvitettiin, millaista tietoa Serres kerää asiakkaistaan, miten sitä hyödynnetään ja mihin sitä tallennetaan sekä millainen rooli asiakkuudenhallintajärjestelmällä on. Haastateltaviksi valittiin kaksi henkilöä toimenkuvan perusteella, yksi johdon puolelta ja yksi myyntihenkilöstöstä.

Haastattelutulosten perusteella tekijä valitsi pääkehitysalueiksi käyttäjien sitouttamisen, asiakassegmentoinnin, asiakkuudenhallintajärjestelmän hyödyntämisen tuotekehityksen yhteydessä sekä tietojen jakamisen eri järjestelmien välillä. Näille osa-alueille tekijä on esittänyt kehitystoimipiteitä.

Asiasanat: asiakkuudenhallinta, CRM, myynnin johtaminen, suhdemarkkinointi

TABLE OF CONTENTS

Terms and Abbreviations

CRM	Customer relationship management
LCR	Leading customer relations
Strategic CRM	Developing a customer oriented business culture
Functional CRM	Front-office operation processes
Analytical CRM	Identifying business opportunities, data mining
Partnership CRM	Cooperating over organizations boundaries
GPO	Group Purchasing Organization
B2B	Business-to-business
BU	Business unit

Tables, Figures and Pictures

1 INTRODUCTION

The purpose of the thesis is to identify how Serres Oy is able to utilize and to develop a more efficient customer relationship management (CRM) system at its three business unit’s Sales & Marketing, Nemo and Nautilus. Business unit’s Nemo and Nautilus are focused on product development of existing and new products. Sales and Marketing unit is focused on customers in Finland and distributors in Europe, Asia, South-Africa and Middle East. With efficient CRM, Serres can follow sales activities and new opportunities as well as strengthen the customer relationship with current customers.

The thesis is consisting of a theoretical and an empirical part. Theoretical background is built on sales management, business-to-business marketing and customer relationship management. Emphasis of the theoretical background is on the customer relationship management for opening the concept of it to support the empirical part of the thesis.

Empirical part of the thesis is based on the CRM project in Serres Oy as well as on semi-structured interviews of how customer information is collected, stored and utilized, to see what role CRM system has. At first starting from the project, reasons and target for the project are introduced as well as the implementation and challenges during the project. Continuing to transcribed interviews from two CRM system users who were selected based on their position and their customer base for to get different point of views, one from management whose customer base is distributor’s and one sales person whose customer base is Finnish end-customers.

Development areas have been chosen based on the interviews as well as author’s knowledge of the system as main user has been considered giving the system operator point of view.

The CRM project included also US company Serres Inc. and it has been taken into account in the development part even though the focus of the thesis is on Serres Oy.

1.1 Case company Serres Oy

Serres is a family-owned business and it was founded in 1973 in Kauhajoki. Company's head office is located in Kauhajoki, and its two factories are in Kauhajoki and Saarijärvi. Serres is a highly specialized plastics manufacturer with 180 employees (Serres, about us [Ref. 19-11-2016]).

Starting by manufacturing floor drains and expanding to developing new kind of suction bag, in 1978 first suction bag was made and in 1988 first suction bags were exported to Scandinavia. First distributor agreement was signed with Netherlands in 1990 (Waclin, 2013, 45, 74-75).

In 2011 Serres Group corporation was formed with divisions Serres and Vieser. In the beginning of this year these two divisions were separated into two companies Serres Oy and Vieser Oy.

Serres Oy is the largest manufacturer of suction bag systems in Europe (Serres, about us [Ref. 19-11-2016]). Vieser Oy is the leading manufacturer of floor drains in the Nordic countries, all together exporting to over 30 countries. Over 80 % of sales is coming from export (Serres Group, Faktat / 2015 [Ref. 19-11-2016]).

Serres Oy has three business units Sales & Marketing, Nemo and Nautilus as can be seen in the organization chart (Figure 1).

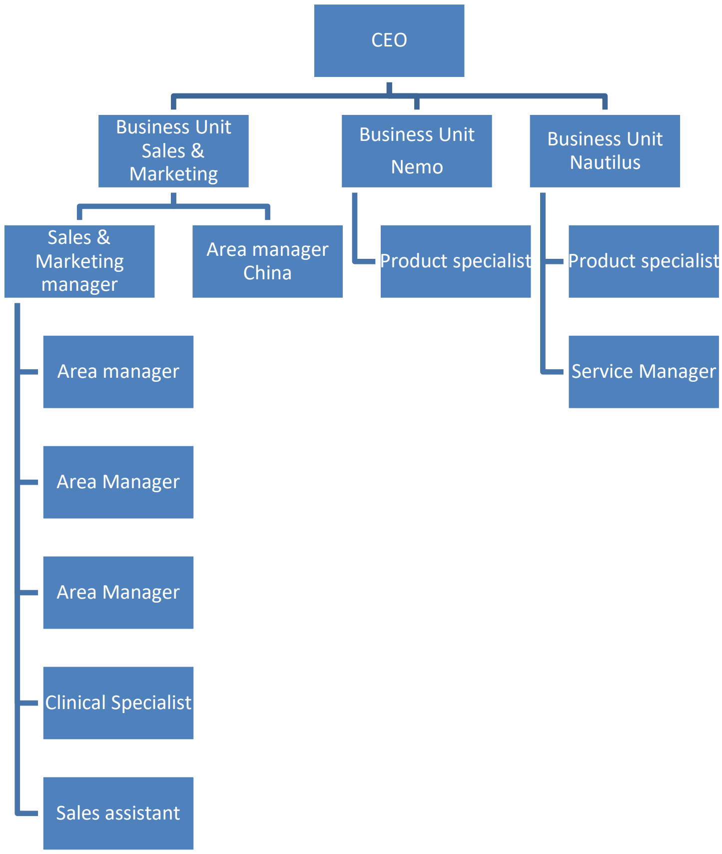


Figure 1. Organization chart of Serres Oy.

Nemo is concentrating on current suction bag products and Nautilus on new suction system development. Both business units are insuring their competitiveness and profitability by developing and improving new and current products in a customer-oriented way as well as by planning market strategies.

Sales & Marketing is responsible for the operative sales and marketing operations for both business units as well as developing the distributor cooperation and tools for sales forecasting and customer relationship management. Sales personnel are area managers and a clinical specialist and each have own countries to be responsible for.

In 2014 Serres Inc. was founded for expanding the suction bag business in to the US market.

1.2 Objective of the thesis

The objective of the thesis is to develop CRM system further in Serres Oy in the way that users are involved and engaged with the system so that it becomes everyday tool to work with. Theoretical part is increasing knowledge of customer relationship management by which giving tools to achieve the objective. The development part starting from chapter 6 is based on the semi-structured interviews and author’s experience and knowledge of the system. For semi-structured interviews two types of users were selected, one from management and one from sales representative.

The point of view of the development is as Hellman, Peuhkurinen & Raulas (2005, 51) describes that CRM is the actions taken to achieve the defined customer objectives and strategies, and CRM is an operative function of customer management.

2 SALES MANAGEMENT

Markets are filled with products and organizations have been moving from product oriented culture to customer orientation. Storbacka & Lehtinen (2002, 20) thinks that customer oriented organization is constantly growing its knowledge on how customers are making value to themselves. Competitive advantage is now the way organization is taking the customer into consideration in all its processes and how well they know their customer for to establish long term relationships and have loyal customers.

According to Wollan, R. (2016, 8) leaders in business-to-business organizations are aware that customer experience is becoming a cornerstone for sustainable growth whereas products and pricing are losing effectiveness as differentiators. The demand is growing when business-to-business customers constantly evaluate vendors because of availability of digital data and influencers.

Rubanovitsch & Aalto (2007, 61) recognizes three areas in sales which are important for developing the business. Firstly, developing quality of sales process so that the customer and the company will have the best possible outcome which is providing extra value for customer, having more sale and making profit. Secondly current customer relationships should be enhanced and find the tools to develop them and thirdly company should also adequately select customers to develop the customer base.

Dyché (2002, 48) is illustrating Eddie Bauer, Inc.'s learning relationship model (Figure 2) that she is using as an example on how to build customer value. Gathered data can be converted to information to differentiate and to customize communication by which stronger customer relationships can be established.

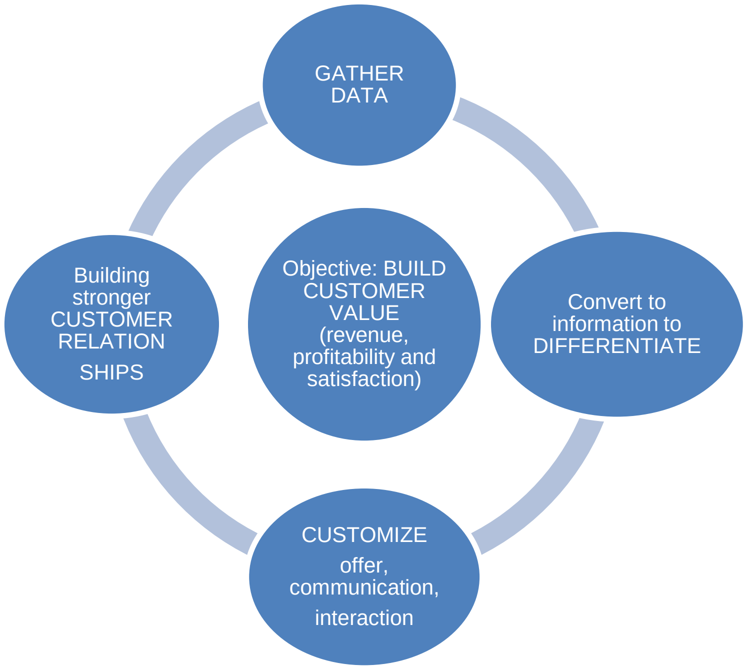


Figure 2. The learning relationship model (Dyché, 2002, 48).

Customer is a meaningful and important capital to a company. As Hellman (Hellman & Värilä 2009, 175) is comparing customer capital to other company capital, it is found that customer capital is describing the true value of the company since it takes into consideration the past and future development of company's competition, customer and customer relationship as well as customer operating field through several years. Customer capital is interesting, objective and concrete based on facts and clear factors giving the possibility for efficient management of business.

Per Storbacka et al. (2002, 38, 41, 45, 48) in customer oriented thinking the resources of customership are feelings, knowledge and actions. Organization should have a piece of customer's heart, mind and wallet for gaining competitiveness. Heart meaning that customer is feeling certainty and trust towards the organization by which organization is having a loyal and committed customer. Mind meaning the knowledge that a customer has about the organization as well as the knowledge organization has about the customer. Actions meaning that the organization is providing goods, services and other customer investments for example marketing and in return customer is giving money and time to the organization to get value.

Clear view on what is the meaning of the customer to a business on a short and long term is needed for defining customer capital. Hellman et al. (2009, 184) points out that when management of customer knowledge and customer relationships are supported by right IT-systems, communication channels and trade channels, they can offer important platform for business development.

According to Peppers & Rogers (2004, 5) focusing on customers in order to gain competitive advantage would require from an organization new strategies that will increase the value of customer base by acquiring new profitable customers, keeping and winning back profitable customers as well as letting go unprofitable customers.

2.1 Customer information

The information of the customer is important to preserve so that the relationship with the customer is not affected by organizational changes for example change of the contact person, but can continue without interruptions at the same level as previously.

Rubanovich et al. (2007,64) states that sales should be able to identify which customers are the ones to put effort and resources in. Segmentation of current and new customers should be made based on their future purchase and growth potential, not just the current purchases and history information.

Customer information can be gathered as customer data base. By analysing this data base, it is possible to find differences and similarities between the customers as well as find the potential customers and make a strategy for every customer base to give more value (Storbacka et al. 2002, 53, 57).

Customer information is something that an organization cannot have too much of. Burnett (2001, 184) advices that customer information should be gathered from all who are in contact with the customer at all levels in organization and this information should be accessible, readable and updated by all team members.

Serres Oy has an enterprise resource planning (ERP) system which is containing basic information of the customer such as delivery - and invoice address, prices, payment - and delivery term. The information in ERP is automatically going to a reporting programme where current as well as history purchases can be found.

2.1.1 Tacit knowledge

Tacit knowledge is difficult to write down as it is based on one’s experiences, skills and feelings. Sales representative is forming a relationship with the customer and the longer the relationship is the more tacit knowledge one has. Copying tacit knowledge is impossible which is making it valuable information for an organization.

Virtainlahti (2009, 108-109) feels that through sharing knowledge, it is possible for an organization to insure the capability to react to unexpected situations as well as utilize and combine knowledges for to improve performance. She is listing benefits of sharing tacit knowledge:

- Can insure organization’s performance, continuance and quality.
- Know-how and knowledge become visible and they can be improved.
- Work tasks become visible and they can be improved.
- Best practices can be shared with all.
- Different kind knowledge can be utilized.
- Can improve wellbeing of employees.
- Sense of community can be enhanced.
- Can create an atmosphere that appreciates know-how.
- Sharing knowledge is a positive responsibility.

2.2 Business-to-business marketing

Customers can be in a different phase, some are born, some are developed and some are ending and each group should be approached differently. Marketing can be seen as the actions taken although every day processes and encounters with the customer are also marketing.

Bergström & Leppänen (2016, 259) sees that customer knowledge is the foundation for marketing and an organization should adapt its message depending on the customer's position, for example is there an existing need to buy a product or raise interest.

Organization could strengthen its capability of using systematic analysis as well as personal experience and insights, when marketing (Gummeson, 1999, 13).

Marketing communication can be divided to three stages, launch, remind and sustain. Communication at launch stage is used when an organization is starting the business or a new product is launched. Next stage is to remind new customers of the product and get them to purchase again. Sustain stage is where current customers are communicated as an organization has the need to keep a certain demand level (Bergström et al., 2016, 261).

In B2B, marketing is done through personal selling and direct marketing. In Serres Oy marketing and sales promotion is done by sales personnel who are visiting customers and buyers introducing and sharing information of the products as well as closing deals. Sales personnel are supported by sales assistants who are taking care of the orders and providing customer service.

In Serres marketing is emphasized for example during a new product launch. Good example of this is from last year when Serres organized a Nemo road show that introduced a new suction bag emptying device to selected hospitals in Finland.

Before the introduction day, key contacts from different departments of the hospital were invited by email. They were also reminded one day before the introduction. For to gain more visibility, news of the coming Nemo road show was published on web page.

Full functioning Nemo device was set up in a camper van (Picture 1.) in hospital courtyard so that for example head nurses could come and see it.

Picture 1. Camper van from Nemo road show.

The road show had positive feedback as being new and different way of doing product introduction. Although purchase decisions were not able to be made on the spot, it raised interest towards the product.

As marketing actions and communication are focused on sustaining current customers, marketing communication towards customers that buy rarely or buy for the first time is something Serres could improve. They could for example follow-up with few questions of the product to find out if it did answer to customers' expectations or send a product catalogue with the first order for a new customer.

One of the major marketing communication channel that is unused in Serres is social media. It would have been a great asset during Nemo road show as one might have been following the tour and get interested of the product. Social media can be the channel to reach the nurses that work with Serres products every day. It can also be a channel to increase knowledge of the products as well as general information from healthcare business.

2.3 **Relationship marketing**

Dyché (2002, 25-26) describes relationship marketing as customer-focused marketing based on detailed customer behavior and profile. It is targeted at individuals and it is long-term. One-to-one marketing is including also developing custom products and tailoring messages based on unspoken needs of a customer as well as knowing the interaction preferences.

In an organization, there are full-time marketers and part-time marketers who are influencing the customer relationship.

Gummeson (Figure 3.) identifies full-time marketers as those who are working with marketing and sales tasks and part-time marketers all other employees as well as external agents.

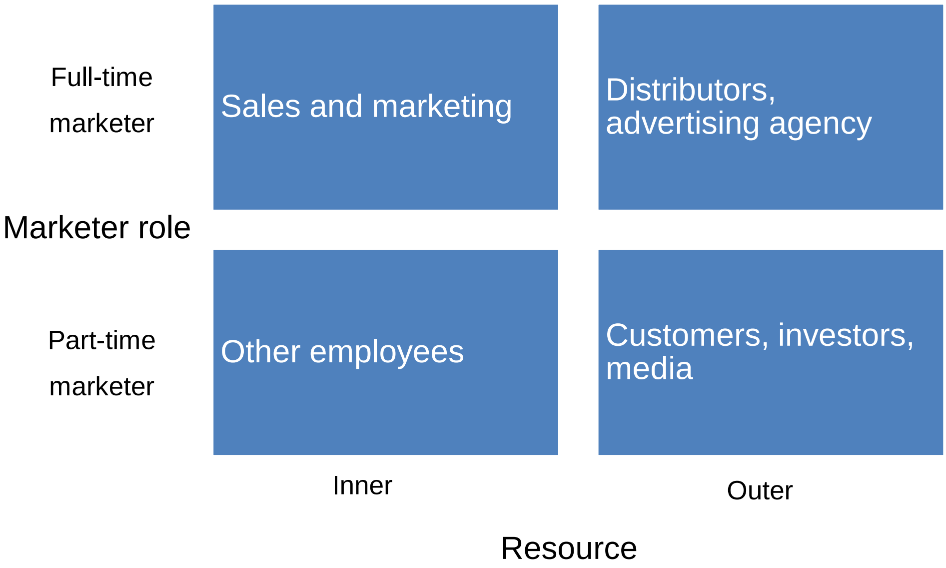


Figure 3. Marketer roles (Gummeson, 1999, 46).

CRM is enabling campaign marketing management to analyze the success of a campaign and then utilize the information for future campaigns. Organization could have more campaigns by targeting smaller customer segments by which continuing interaction with multiple customers (Dyché, 2002, 31).

According to Burnett (2001, 4) marketing success can be achieved by combining three activities: selecting, recognizing and analyzing market segments, making products and services that are substantial and identifying key customer in the segments and focusing sales activities on them.

As Storbacka et al. (2002, 90) is stating, by knowing the customer, it is possible for an organization to recognize when their interest is close to its peak and then start to do marketing. Customer knowledge requires documentation of the customer and analysis of the information in order to develop the relationship further.

Storbacka et al. (2002, 97, 104) sees that at a development phase the duration and the strength of customer relationship becomes important since long relationships bring more value than short ones. In this phase organization is creating bonds with the customer based on actions, knowledge and feelings which all affect to customer satisfaction. Customer is not evaluating a single moment but the whole relationship which is why the customer processes must be handled well, and in case of ending the relationship, making it easy and possible for the customer to come back.

In business-to-business marketing environment there are many different people that the organization is in contact with. Technology might provide the possibility to manage individual relationships for example with the purchaser, financial director or someone who is using the product from an organization level, which could secure that the relationship is attached more to the organization instead of for example to sales representative (Peppers et al. 2004, 95).

2.3.1 Marketing channels

Bergström et al. (2015, 230) says that the choice of the marketing channel is a decision that will affect to organization’s entry to market, sales development, image forming, position success and it will also guide the physical distribution of products.

An organization can use intermediaries to sell or distribute their products to end-user. Distribution channels can be used for efficient marketing and gaining expertise that an organization might lack of even though the channel itself could prevent closer relationship with the end-customer (Peppers et al. 2004, 411).

In B2B it is possible to use selective or exclusive distribution. Bergström et al. (2015, 227) is describing selective distribution when whole-sellers are selected through different selection methods and they fulfill the criteria of the organization. Selective distribution is used when the target group can be clearly limited and the organization wants to emphasize difference and image of the product by giving limited access to it. Exclusive distribution is when an organization is giving exclusive rights to certain whole-seller in a certain area. As in selective distribution, target group can be very limited.

In B2B, distribution channel (Figure 4.) might involve manufacturer's sales branch, representative or distributor and variables of these; sales branch and distributor or representative and distributor (Peppers et al. 2004, 412).

Manufacturer → Manufacturer's representative → Distributor → end-customer

Manufacturer → Manufacturer's representative → end-customer

Manufacturer → Distributor → end-customer

Manufacturer → end-customer

Manufacturer → Manufacturer's sales branch → end-customer

Manufacturer → Manufacturer's sales branch → Distributor → end-customer

Figure 4. Marketing channels in business-to-business (Peppers et al. 2004).

Case company Serres Oy is a B2B operative and it is using distributors as marketing channel in foreign markets whereas in domestic market they are selling directly to end-customers. Contracts with distributors are made for long-term therefore also the relationships are long and valued. Serres is using selective and exclusive distribution as they operate in a niche market. Most of the distributors have an exclusive right to sell Serres product in their country.

A study (Sakarmeas, Zeriti & Baltas, 2016, 22) of importer-exporter relationship value, its drivers and impact on customer loyalty, is showing that it is beneficiary for a supplier in overseas to make relationship-specific investments and share knowledge as well as to be able to supplement the importer and establish guidelines to bring value to the relationship.

The study (Sakarmeas et al. 2016, 34) is also revealing that the exporting organization's extension of understanding and adapting overseas business practices are matters that have high importance to a customer overseas. By understanding market conditions and business culture of the channel partner, the exporting organization is able to customize its approach accordingly and overcome the negative impact of psychic distance resulting having an advantage to competitors.

Sakarmeas et al. (2016, 34) claims that compatible objectives and characteristics between channel partners are creating superior relationship value and strengthens competitiveness in the global markets. Management strategies should support those relationship-specific assets in order to achieve effective and efficient interaction.

Serres is making relationship-specific investments by supporting a distributor with tenders, usually by giving products free of charge or with lower prices, and by making specific product labeling for certain countries. For sharing knowledge and information, Serres has an Extranet, an internet based platform, where distributor can find for example product information, support videos and marketing material that are supporting distributor and its sales personnel. It is also possible to give new product ideas or feedback, and leave complaints through Extranet.

3 CUSTOMER RELATIONSHIP MANAGEMENT

Customer relationship management, CRM, has many different meanings and an organization should define what they mean by CRM. Oksanen (2010, 22) describes CRM as

- Concept for methods and IT-system for to manage customers.
- Process through which all customer encounters are managed.
- Approach to identify, require and obtain customers.
- IT-system for business to plan, schedule and manage marketing, sales and customer service.
- Business strategy for maximize customer profitability, revenue and satisfaction.

According to Hellman et al. (2005, 51) customer relationship management is an operative function of customer management, that is the actions taken in order to achieve the defined customer objectives and strategies.

Hellman et al. (2009, 51) finds that customer management is managing the business through customer relationships. It identifies the customer objectives and strategies and the tools to support these. Customer oriented thinking is challenging the product oriented objective and strategy working in organization.

Lehtinen (2004, 21) is describing CRM as a tool that is needed for leading customer relations. Leading customer relations (LCR) is a way of management and it is involving the whole organization. In LCR customers are one of the binding resources in delivery network which is led by their point of view.

Dyché (2002, 4-5) has the point of view that CRM is a business philosophy affecting the whole company. CRM is not only managing and monitoring the customer behavior as it also has the potential to change the customer’s relationship with the organization which can have positive effect on revenues.

3.1 CRM in organization

According to Dyché (2002, 5) an organization can define its CRM success based on business objectives. As CRM is providing information on customers, helping to understand which customers are important to keep, it is also saving time by automating processes and providing analysis.

CRM can have strategic, functional, analytical or partnership orientation. The focus on strategic CRM is developing a customer oriented business culture. Functional CRM focus is on the front-office operation processes sales, marketing and customer service. Analytical CRM identifies business opportunities and data mining, and partnership orientation is cooperation over organizations boundaries (Oksanen, 2010, 24).

Oksanen (2010, 55) recognizes that usually behind the CRM project is a need for new strategy or development for example pursue new markets or new customers and it is bringing new ways of working through new system.

In Serres's case both reasons, development and pursuing new market were the strategic reasons behind the CRM. The use of CRM at this first stage is strategic and functional. Serres has a customer oriented business culture which can be developed further with CRM. With the help of CRM, front-office activities can be more personalized and the information is available to everyone at any time.

Dyché (2002, 9) explains that owning the customer experience is to have the ability to influence on how the customer sees the organization in different touchpoints instead of trying to control what happens during a customer interaction. CRM can bring out the customers' unspoken needs.

Wollan (2016, 8) states that to outweigh competitors in customer experience an organization should have a strategy for customer experience and execution, a set of mind that after-sales service is critical and desire to invest to new digital technologies as well as to traditional customer connection points.

3.2 Implementing CRM system

Like in every new development in organization, management must be committed to the change and show an example to the employees. It is important to show to the users the value that the new way of working will bring to them.

Reasons why CRM system might fail are that it has not been seen a part of management but only a IT-software, implementation of the system has been done poorly and there has been a lack of support from management (Lehtinen, 2004, 20).

Dyché (2002, 256) is giving tools in a form of check list for to avoid the failure during implementation:

- An organization should identify CRM strategy, what does it mean to business and what kind of information it should give.
- Putting effort, not only to planning and development, but also to applying the system, users are more likely to adopt it.
- By specifying success metrics for CRM, business successes are defined to CRM as they should be.
- An organization should base the decision to use application services provider model on the business and functionality.
- Processes should be improved and modified in the way that CRM technology is included to them and they should be made from customer's point of view.
- When gathering, and combining customer data from different systems, an organization is able to understand the customer across one's multiple touchpoints within the organization.
- Understanding that CRM is continuous work even after successful implementation.

Oksanen (2010, 257) points out that to enable the user, the ground rules should be identified by answering the questions on why, when and how the CRM system is used. Different kind of support material such as quick guide or feedback form are needed during successful implementation.

After the implementation, it is important to follow the usage. Organization can for example follow how actively the system is used by team or individual level, check that the information is correctly inserted or modified and oversee that the new methods are being complied (Oksanen, 2010, 288).

Oksanen (2010, 291) states that when imbedding the CRM in the organization, the role of management and superiors is very important. They need to set the example and use the CRM in their work as well for example implementing CRM to every day functions by utilizing the reports from CRM in meetings.

He (Oksanen, 2010, 294) also suggests that business indicators are creating the force to use the system by which they are helping imbedding the system in the organization. The indicators should be built so that the results can be compared within long period.

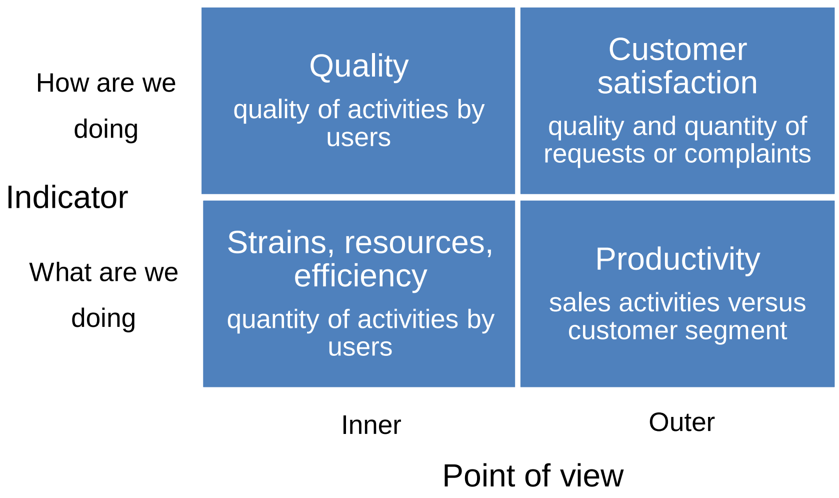


Figure 5. CRM indicators for an organization (Oksanen, 2010, 293).

Oksanen (2010, 293) has illustrated two CRM indicators, what are we doing and how are we doing (Figure 5). The figure is showing examples on what measurements an organization might have from inner and outer point of view. Inner meaning the organization and its employees and outer the customer.

In Serres, the indicators in Figure 3. could be used for current markets where sales activities are measured. For Serres Inc. the indicators (Figure 6) could be leads since it is a new market. The inner point of view could be quantity and quality of leads where quality of leads can be measured by how many of them have turned to opportunity. Outer point of view could be quantity of customer inquiry and marketing activities made.

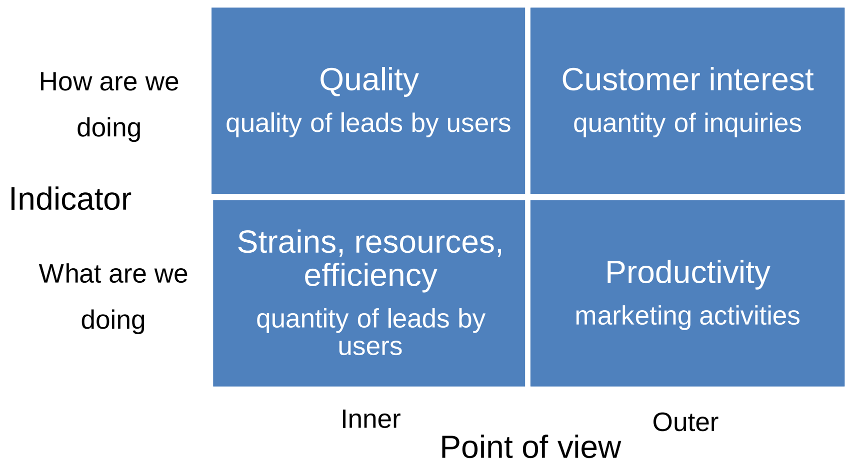


Figure 6. CRM indicators for Serres Inc.

4 Case Serres Oy

The customer information is currently saved on a common or one's own hard drive as an Excel file for example of customer contact information or Word documents for example of customer visits. Customer information can also be in an email containing for example price offer or it is unwritten knowledge such as tacit knowledge. Information is spread and it is time consuming to find it if it is available.

Serres Oy has an enterprise resource planning (ERP) system, which is providing information of current sales and history data but they did not have a system, that would provide collective information behind sales or what can be expected.

The main reason why customer relationship management system (CRM) was taken into use, was that everyone would have a access to the customer information to be on the same page with other team members as well as with the customer for example in case of sudden changes. Also, to save the customer information in the same format and to be more easy to find thus being more usable.

In the US, which is a new market, potential customers and sales activities are playing important role for Serres Inc. when penetrating the market. Through the system Serres Inc. is able to document and follow the development. The information is also important to share with Serres Oy as a manufacturer thus it will give advantage to plan and to be prepared for possible increase in demand.

4.1 The target of CRM

The target of the CRM (Figure 7.) is to provide everyone in the sales team up-to-date information of customers and the sales activities that sales managers have made with the customers in order to give better customer service. In this case, better customer service means that any team member can handle the customer.

The target is also to gather the customer information in more usable form instead of separate Excel files and Word documents which are difficult to keep updated.

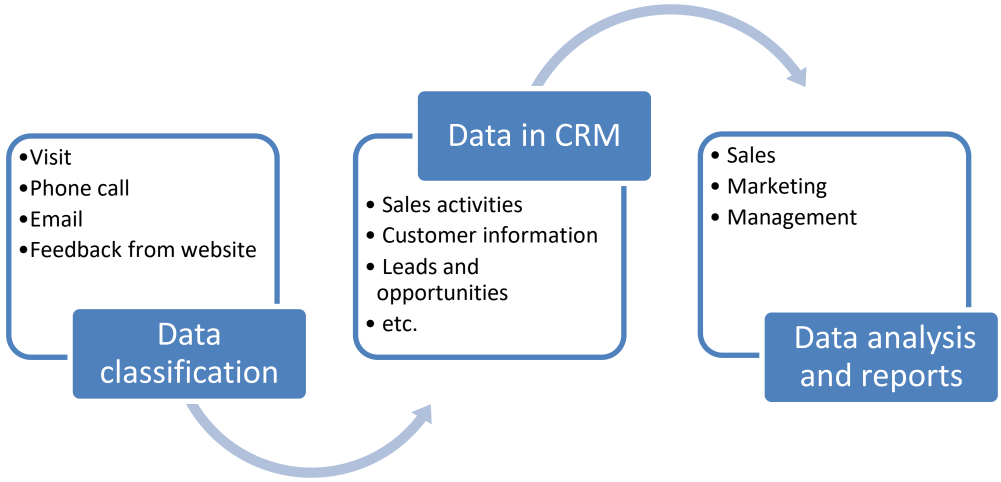


Figure 7. Target of CRM.

With the CRM system Microsoft Dynamics, potential customers in new markets or customer having interest towards new product can be detected. Customer information and contacts as well as sales activities are stored in one place for everyone's usage.

The system is providing reporting tools, which can be used to report to the management on the activities and potential customers for giving overall picture of the future markets.

Serres Oy is able to do specified marketing based on the information on existing or new customers, for example what they are interested in and their potentiality. For marketing purposes marketing lists with different attributes can be created through the system.

4.2 Reaching the target

There needs to be a full engagement from sales managers to use the system as well as a change in the way of working. It will also need commitment and surveillance from management for to reach the target. The system is only as good as the data there.

Internal trainings and constant development of the system is needed. Development can be for example a small update to a feature to make the system more user friendly or it can be developing graphics for reporting. Users should be informed about the changes made in the system and given extra training if needed.

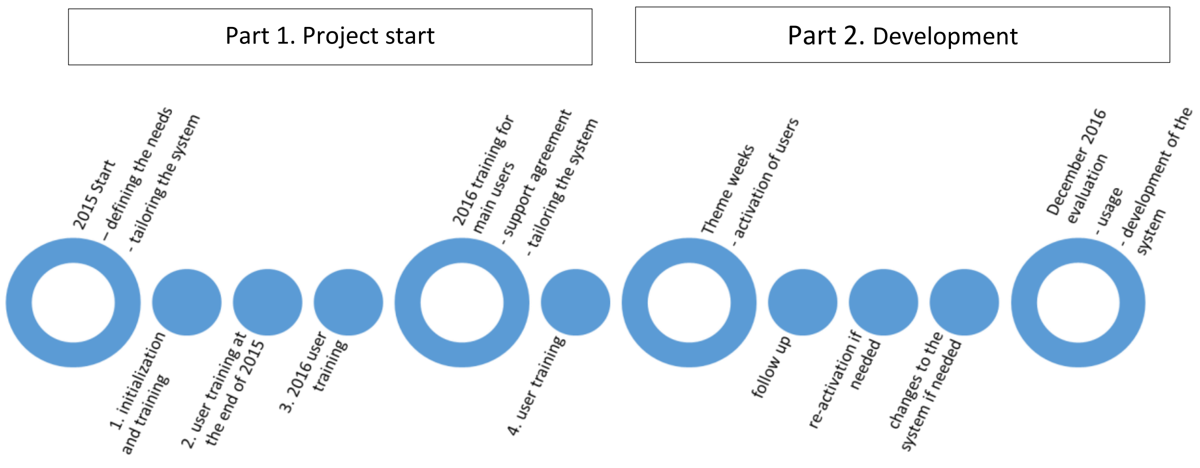
New sales managers are trained to use the system and extra training is provided for current users by the main user. Internal trainings should help sales managers, not only to learn the system but also to see the benefits of it. Serres has had internal trainings where the information needed to be saved in the system has been agreed.

When the system is used daily, and updated, it will be a tool that is giving important and useful information about the customers. Customer service will improve when one does not have to go through the emails and Excels to search for information.

4.3 Implementing CRM system

The timeline (Figure 8.) is showing the steps that have been taken and that are to come for ongoing CRM project at Serres. As previous chapters were about the reasons and target for CRM, the following chapters will go through the project from the start to development in chapters 5 and 6.

Figure 8. Project timeline.



Serres started in 2015 by looking for a system provider and CRM system that would be suitable for them. First meeting was held in summer 2015 with the Microsoft Dynamics provider, US and Finland sales persons and main users in order to identify the features which were needed. The program was tailored for Serres and to make the usage simple, parts that were not needed were removed if possible. During the implementation Serres customers in Finland and distributors as well as customers in US were taken in.

Implementing this new system has taken over a year and there are multiple reasons behind why it has taken such a long time. Firstly, Serres had a slow start because of the timing of implementation. Introduction of the program was in the summer time which is the holiday season so sales persons were not able to start the learning and getting to know the system right away. At the same time Serres had another new program taken into use which also took time away from the learning process.

Secondly when the person who was heading the CRM system left the company, there were not enough resources to concentrate on the CRM system. Lack of commitment, implementation plan and internal guidelines led to the situation that the CRM was not in use.

At the end of 2015 internal training was given for the users of the basic use of the system and a new timeframe was that everyone should actively use the system from the beginning of 2016. After the training, another meeting was held to agree on how to use the system and what kind of information there should be as well as the way information is put down. A user guide was made based on the training and the meeting.

At the same time, it was noticed that Serres did not have a support agreement with the system provider which would have been needed when customizing the system and having a helpdesk available when difficulties occur.

After signing a contract of support, main users and the support provider had CRM training. On the agenda was:

- To go through the system for to understand how different parts of the system are connected to each other.
- Training on how to do changes.
- Modify work areas for to make the system more user friendly.

During that training adjustments were made to the system such as changing the summary views, deleting functions which were established during project startup, but were similar to CRM's own and creating business units Serres Oy for Finnish customers as well as distributors and Serres Inc. for US customers. After the training user guide (appendix 1.) was updated and new features were introduced to the team.

4.4 **CRM in use**

CRM is used as a customer and contact register to follow and plan sales activities, to identify potential customers, to manage offers and trials and to plan and control marketing campaigns. Active use of CRM will provide information of the customer relationship; on how it has developed, how the customer has been taken care of and by who. Based on the information, it is possible to determine how to develop the relationship further for example to gain more loyalty and sustainability within customers.

It is possible to access to CRM data by using Outlook, Internet portal or mobile application. This way, sales persons and others in the sales team have the possibility to have the customer information on hand when needed.

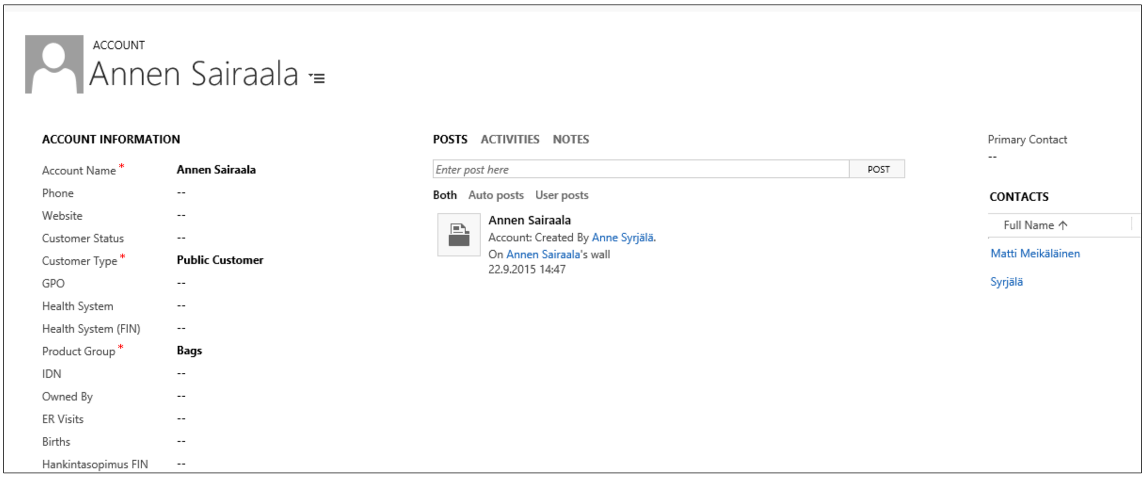
Reporting has not been a current issue since the system does not yet contain enough data. There are ready made charts that can be used to report to the management on possibilities in the markets and to follow how actively the system is used.

There are areas in the CRM system that will provide important information of the customer and can be reported or used in marketing purposes. Next chapters will take a closer look at these areas that are customer information, sales activities, leads, opportunities and marketing lists.

At the moment Serres is in a stage between the old and new. Implementation of CRM system is still going on; it is used every now thus still needs to be more integrated into every day work. Chapter 5 will bring forth the user point of view to current usability as well as ideas for future development.

4.4.1 Customer information in CRM

Customer information and customer contacts (Picture 2.) are the basis of the CRM system which is why it is important to keep the data updated by changing and adding new information.



Picture 2. Account slip.

There are three different customer categories by markets in the CRM system which are followed by sales team:

- USA, new market with sales directly to end-users that is hospitals.
- Finland, existing market with sales directly to end-users that is hospitals.
- Distributors, existing market with sales to current or new distributor.

Although these categories are different on how the marketing channel is build, there are similarities with the customer relationship management which enables the usage of the same CRM system.

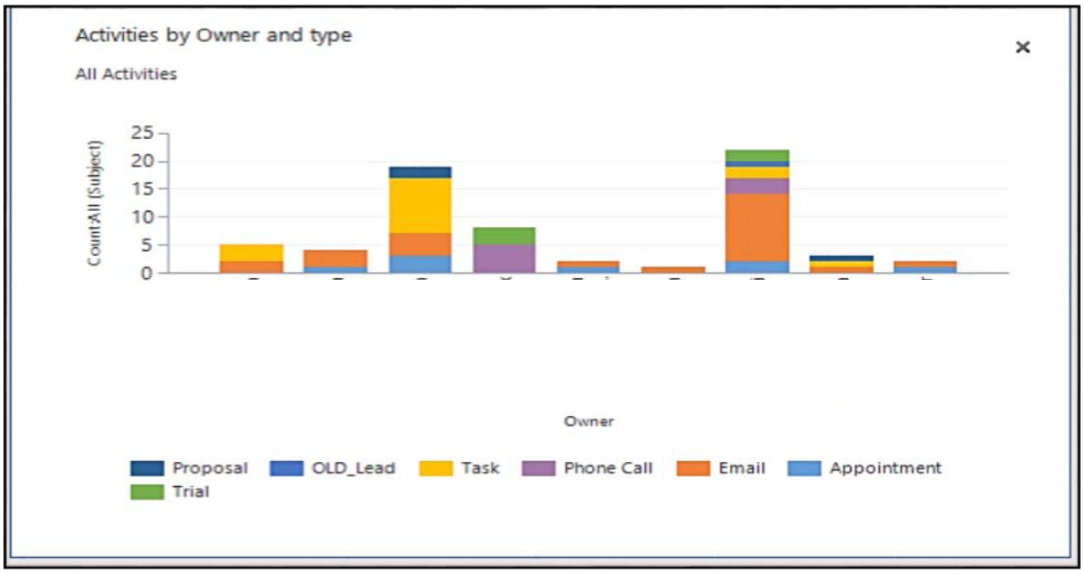
Serres has classified these customers into three groups: distributor, public hospital and private hospital. Customer information is containing basic information such as address, but also some specifics which can appear in different markets, like GPO in US and healthcare system in Finland.

Customer information can provide information for customer profiling for example to find out how many of the public hospitals in Finland Serres has a sales contract with and which hospitals belong to that contract. Although sales contracts are not saved in CRM, the information of it; name and period of validity is useful information when sales person is visiting a customer. This information was difficult to access before, since it was only saved on common drive.

4.4.2 Sales activities

Sales activities are the same whether the customer is a distributor or a hospital, both are contacted by phone, email or face-to-face appointment. These sales activities are followed through CRM system, there are notes on what has been discussed and possibly agreed. With this documentation, it is easier to be in contact with the customer later and to take care of the customer in case of sudden absence of the main contact person.

Sales activities can be reported through charts for example to see what is the primary way to contact customers and to find out if there is need to improve some aspects. Reports can also be used for to choose the right marketing channel.



Picture 3. Sales activity chart.

The system has its own charts but they can also be made for a specific need. Sales activity chart (Picture 3.) was made for Serres in order to see activities by type and by owner in one chart.

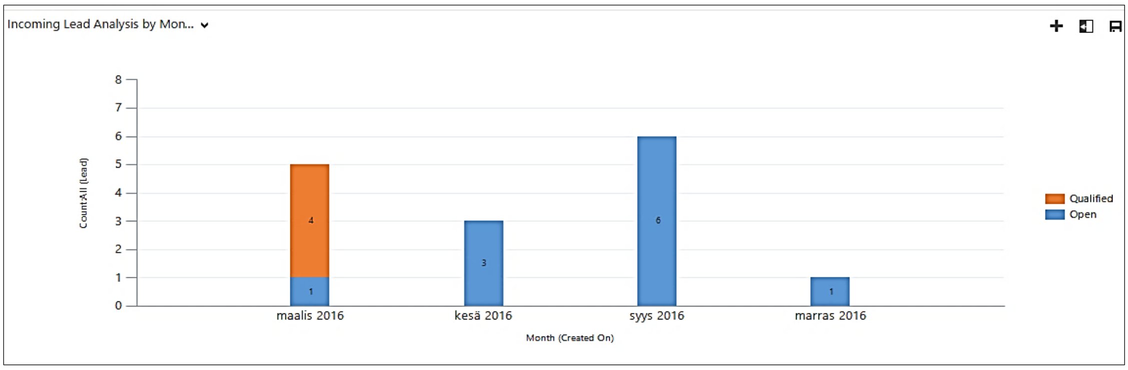
4.4.3 Leads

Leads are new customers that are interested in Serres products. They might ask for more information about product features or a price. Leads can come from different sources for example from fairs, queries through web page or results of seeking new distributor.

In Finland Serres has a 90% market share so new customers do not often appear, yet when they do, CRM can provide information how they found Serres. This can be valuable information for marketing when thinking ways of how to be more reachable.

In new market, like the US, leads are important to document since there are not existing customers. To have information on what the customers are interested in is important information when for example planning marketing campaigns or participating in fairs. Leads can also provide interesting information about the geography in US, if there is a region where hospitals appear to be more interested in Serres products. These potential customers need to be contacted and followed up.

Qualified leads are turned to opportunity which in Serres means that an offer has been, or it is close to be made.



Picture 4. Incoming lead analysis by month.

Picture 4. is a chart from CRM that is showing quantity of incoming leads and their status, qualified or open, by month.

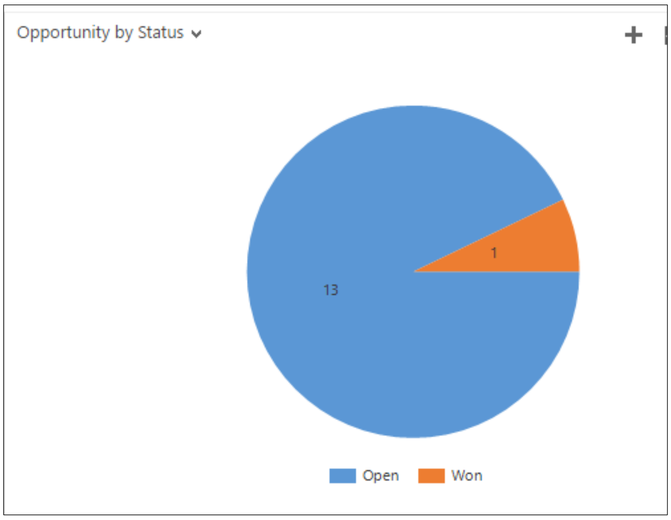
4.4.4 Opportunity

In Finland opportunity is used when making an offer to a new or existing customer which is usually a product offer with special price and for specific timeframe.

When offers, usually send by email, are saved in one place it will be easier to find them and it will save time. In practice, for example, when the order comes in and it has incomplete information, assistants can check the information from the account and have the right price in the order confirmation and in the invoice.

In Finland public purchase offers are made through purchasers or public interface. They are listed and archived in a register for agreements, which is why Serres decided not to have them in CRM merely a mention of it in the customer information.

Opportunities can be showed for example by their status (Picture 5.). Open opportunities are in progress or an offer has been made. Won opportunities are offers that has been won. Open opportunities should be closed as lost or won.



Picture 5. Opportunities by status.

4.4.5 Marketing list

Serres has created various marketing lists for different needs. Some are contacts gathered from fairs so that sales persons can be in touch with potential customers after the event, others are made for email marketing purposes targeted to a specific profession for example product manager.

It is possible to make dynamic marketing lists in CRM. Dynamic marketing lists are lists that will automatically update the contact with certain attribute to the marketing list. For example, when a new contact is added with product manager as a job title, it will be added automatically to the marketing list that has the same attribute. Thus, keeping valid marketing lists customer contact information should be filled and updated when needed.

Picture 6. Campaign slip.

Marketing lists can be linked to a campaign. For example, for Nautilus campaign a Nautilus Newsletter has been sent (Picture 6.).

5 Development of CRM in Serres Oy

In order to have understanding of current situation as well as future needs, semi-structured interviews were conducted. The subject of the interview (appendix 3) was customer information; how is it collected, stored and utilized, as well as customer management. Two different types of CRM users were interviewed, one from management who is responsible for Sales & Marketing BU and has distributors as customers (interviewee # 1) and one from sales personnel who is responsible for Finnish end customers (interviewee # 2).

This chapter will go through the transcribed interview and development areas that rose from the interviews are introduced in chapter 6.

5.1 Collecting customer information

In addition to basic information that is name, address and so on, Serres is collecting information on for example customer tenders, market situation, prices, travel reports, offers, trials and hospital operations such as how many operating rooms the hospital has and what kind of suction bags they are using.

> (End customer) Information is usually collected during visit or through inquires which mostly are coming by email and some information can come through trades and fairs. Information is also gathered from customer need or a problem that needs to be solved (interviewee # 2).

On the other hand, everyone who are in contact with the customer from BU's Sales & Marketing, Nemo and Nautilus are collecting information as interviewee # 1 pointed out.

Information that is collected of customers varies depending on whether the customer is an end customer or a distributor. Information from end customer is more of practicalities and the usage whereas distributors give information of their markets and business opportunities. It is easier to get information straight from the hospital than from a distributor since they tend to be more protective of the information of their customer thus that is the knowledge that has important value for Serres.

> There is a need for more information of the distributor's sales force such as the know-how and changes in personnel, how active are they in their market area as well as of distributor's sales processes for example who is the contact person at their end customer; is it a purchaser or a nurse (interviewee # 1).

Increasing customer knowledge by understanding on how distributors operate would lead to improved customer service.

5.2 Storing customer information

As the system has not been fully implemented, it can be see that there are different ways of working at the moment. Interviewee # 1 is using previous way of working and is currently saving data to a common drive whereas interviewee # 2 is occasionally using CRM, mostly for to save contact details.

When asking, what are the obstacles for not using CRM two reasons clearly came up, old habits and logic of the system. Old habits are difficult to let go when one is not comfortable with the new.

> Old habits. There is no such force to use CRM, do not have enough time to orientate especially when there is an alternative way to search information (interviewee # 1).

> It takes time to get used to the CRM language and logic. It is unclear where to save the information for example what has been talked about with the customer (interviewee # 2).

5.3 Utilizing customer information

Basic information is for everyone's use, as interviewee # 1 stated. In ERP there is information of deliveries, invoicing and pricing. This information is used when reporting customers' purchases to the board of directors, that in fact is the only report which is given regularly. Other reporting matters are changes in the distributor field or in the markets. Customer information is often used when planning visits.

Contact information is used for sending news letters or other information to a larger group, usually to distributors. Marketing letters are rarely send to a Finnish end customers and email marketing could be done more since CRM is helping to keep the contacts updated.

> Contact information of Finnish customers is hard to keep updated because there are a lot of personnel changes occurring in hospitals (interviewee # 2).

> For future reporting a device register or similar would be needed. It should indicate the device number, location and a log of maintenance. For to ensure the know-how of distributors' sales persons, we have provided a training tool that is including an exam. Information on who has gone through the training and done the exam should be in CRM (interviewee # 1).

Interviewees both see aspects in CRM that would add value to their work. Information that is useful and where CRM can be used more, is saving contacts from trade fairs, from end customer contacts, questions and cooperation interests that currently are coming as feedback from web site.

CRM enables to do more marketing and specified marketing campaigns in the future. It is also possible to get insight on how the relationship with the customer is managed and one can form a customer profile in CRM.

5.4 Customer management

> It is defined in area manager's annual plan how many times per year a bigger distributor is visited for to ensure that enough time is spend with them (interviewee # 1).

For Finnish end-customer this has not been defined. Interviewee # 2 has scheduled visits so that area - and central hospitals are visited once a year, and university hospitals once or twice a year which are the biggest customers in Finland. Smaller hospitals are visited when needed.

Both type of customer is mostly communicated by email and visits are important part. Communication seems to be more reactive than proactive although bigger customers are followed up frequently.

According to interviewee # 1, relationships with distributors are long and it is just known which distributors are prioritized higher than other. Categorizing customers and distributors by mapping out how the customer is handled would be helpful when for example training new people.

> It is a good channel for sharing information with colleagues, it would have been the kind of information that I needed when I started. Just should use it more to have a systematic way of working (interviewee # 2).
>
> Information on customer purchases meaning what products are bought would be nice to have in CRM (interviewee # 2).
>
> Requirements and expectations of distributor as well as support actions giving by Serres to a distributor are information that would be useful in the future (interviewee # 1).

5.5 Summary

Interviews gave a good insight of current usage of the system and what are the obstacles for not to use the CRM as well as brought up development ideas which were taken into account in the next chapter as concrete development areas.

Positive approach and seeing the benefits of the system today and in the future, will help the implementation go further.

6 Development areas

Based on the interviews, user engagement is an important development area at this stage. The CRM can only come familiar through usage and to really see the benefits of the system, users need to be engaged.

Other development area is concerning the system and its usability. Device register or similar, is one that would be useful for product business units and customer segmentation within the system is needed for marketing purposes. Even though the information flow between ERP and CRM was not seen important at this phase by the interviewees, from the main user perspective CRM and ERP or other relevant system should be linked together for automating the information gathering to form a complete picture of the customer.

6.1 User engagement

In order to get users activated and engaged, theme weeks of CRM were organized in June (appendix 2.). Theme weeks were based on CRM portal and users could get to know the system through different activities made in CRM which were partly followed by main user. Separate training sessions were not organized for users since they have had training and user guide available to them instead users could contact the main user in problematic situations.

If the usage of the system is very low at the end of the year, the usage of CRM can be increased by binding it to individual’s annual plan which then will be the necessary force to use the system as interviewee # 1 suggested.

Figure 9. is describing what kind of information Serres has on customers and where it should be saved so that the information is easy to find due to aligned way of store information.

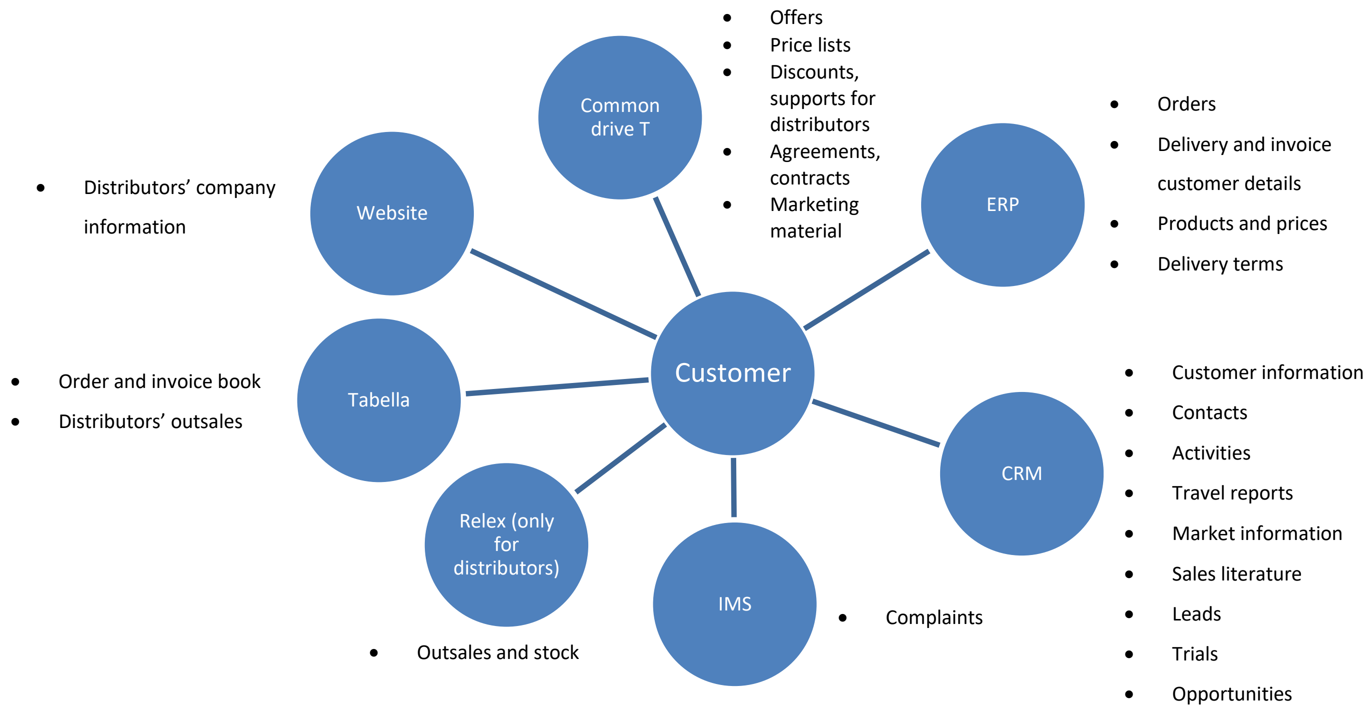


Figure 9. Systems for storing different customer information.

Management should clearly indicate what are their needs and that way show commitment to CRM. Based on those needs CRM measurements can be created and reported regularly for example through charts which would also increase the usage.

The system itself has charts or one can make their own by identifying what information is important and how should it be shown. New charts on activities, leads and opportunities are available for sales to use.

6.2 Customer segmentation

Customers can be divided into three types in CRM: distributor, public and private hospital. The status of a customer can also be indicated as potential or existing. Because of the large amount of the customers in the CRM, over 200 in Finland and over 22 000 in US, they should be segmented further for identifying the key customers. Through this identification it is then possible to do a process for key customer management that is currently missing and is more based on the actions made in previous years.

Simplest way to do the segmentation or classification for existing customer is by customer purchases even though for a deeper understanding of customer other attributes are needed as stated in chapter 2.1. Classification can be for example by giving A, B and C to customers based on their annual purchases; A for purchases over 20 000 €, B for xxxx-xxxx € and C for less than xxxx €.

Key customer management process should describe how many times per year these customers are contacted and when as well as the way they are contacted; what channels are used.

Table 1. Example of key customer management.

Month	1	2	3	4	5	6	7	8	9	10	11	12
Key customer 1	Meeting	e-mail news letter		Trade fair Meeting	e-mail news letter			Meeting	e-mail news letter			Christmas greeting
Key customer 2		e-mail news letter Meeting			e-mail news letter				e-mail news letter	Trade fair Meeting		Christmas greeting
Key customer 3		e-mail news letter	Meeting		e-mail news letter				e-mail news letter		Meeting	Christmas greeting
Key customer 4		e-mail news letter		Meeting	e-mail news letter				e-mail news letter	Trade fair		Christmas greeting Meeting

A matrix with key customers and the activities (Table 1.) will give visual information on how the customers are managed. This can be done also for other customers. When the process is properly descripted, it will help the sales person to organize one's work load and to be more efficient; ensuring that enough time is spent with important customers.

Based on customer segmentation and customer data, marketing can be more precise which will improve and enhance current and new relationships. Marketing does not necessarily have to be about selling a new product, but increasing knowledge of the product and its features that the customer has bought.

When the system has enough information, management and sales are able to form customer profiles and give objectives for a specific customer as well as integrate the information of the customer to business strategy.

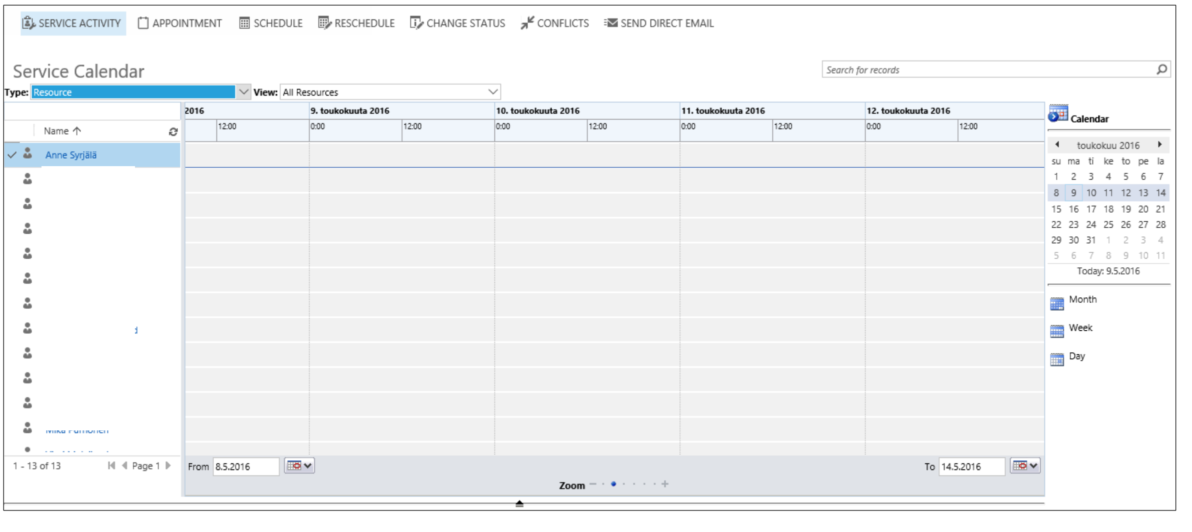
6.3 Use of CRM with product development

Serres BU's Nemo and Nautilus are concentrating on product development, Nemo for current and Nautilus for new product line. Nemo and Nautilus both are dealing with the same customers as Sales & Marketing.

Information on customer interests or improvement suggestions are very valuable for management in order to develop products that are based on customer real needs. Finding and reaching those customers will be more easy when the information is available in CRM and with the possibility to select key customers to be involved with product development.

With Nautilus there will be a need for device register with installation and maintenance data log. When a medical device is in concern, it is mandatory to keep track on when and what kind of maintenance has been done. In CRM it is possible to gather data and keep track on which customers have been visited concerning installation, training or maintenance. This might require connection to ERP where the product and delivery information are, as well as system set up planning by support provider, main user and service manager.

If there were to come maintenance personnel for the device, in CRM is possible to use the service calendar to see who technician is available and book them (Picture 7.).



Picture 7. Service calendar in CRM.

6.4 **Information flow between different systems**

Instead of being separate systems, information flow between the systems would bring together relevant customer information needed for customer relationship management as well as bind the CRM into sales processes.

By integrating CRM and ERP, it will give overall view on business. As CRM is dealing with front-office information of customer interactions, ERP is consisting information for example of customer's purchase history, billing and shipping.

Klie (2016, 31) is identifying in his article three different ways to do integration. The first is called a full rip-and-replace process where all existing software is replaced with new systems that are linked together. The second is a partial rip-and-replace, where few systems are involved. The third way is to install software connectors that share information between existing systems, which would most likely be the option for Serres.

Up-to-date information flow would enable a sales person to use only CRM in their work, especially when visiting a customer as it can be accessed through web portal or through Outlook.

Serres does not have a system for inner information for example Intra or Sharepoint, but when it comes necessary, CRM and Sharepoint has the possibility to be connected to each other. Then, for example the agreements could be saved in the Sharepoint and the customer in CRM linked to the agreement instead of a sales person going through another system for finding the agreement, as it is now.

7 Conclusions

When a large system is taken into use, where are multiple users and a lot of information to collect, it is important to see it as a project, and not just an IT-project but as a project that will improve processes. CRM is an ongoing project that is constantly developed based on the needs of users and the data that is put down there.

Dyché's check list presented in chapter 3.2. can be taken into consideration with any system implementation as it has noteworthy points on how to ensure that the implementation is done comprehensively. First going through current processes, identifying what is the problem, what kind of information is wanted and needed and is it something that needs to be reported, what kind of system can solve the problems and so on.

In Serres case the time used before the implementation as well as a plan for the implementation was not adequate. As described in chapter 4.3 the off-timing as well as lack of implementation plan with program testing time and describing new way of working are reasons why users have not been engaged to CRM and for the low usage of the system. It should have been a project when all the aspects would have been considered.

It is important to make guidelines on what and how the information is going to be inserted in the system for having collective information that can be used for reporting. Guidelines also ease the user's work when one does not need to think about how to put down the information or how to search the information. User guide with details should be made and it should be updated for to make the usage more convenient.

In Serres case development should be focused on users, ways of working and making the CRM everyday tool. It is important to make sure that users stay engaged with the system by following up and removing the obstacles for example the things that are allowing the old habits. Internal trainings (appendix 4.) and information of system updates should be given to users when needed.

As users were already trained but the usage of the system was nonexistent theme weeks were one good way to start. Through different activities users were able to get familiar with the system and at the same time update their customers. Although some users were more active than others, all have the opportunity to see the benefits of the theme weeks after.

CRM can be a communication tool between call center and sales personnel for example call center could leave a callback request from a customer through CRM instead of using email. By that point CRM should be fully owned in Finland and in US.

Serres has multiple systems in use in sales as can be seen from figure 9 on page 43. Each system has its own function, functions that are needed, but the systems are not linked to each other. In order to make the everyday work flexible, the systems that has relevant customer information from the customer management point of view should be linked to CRM or vice versa.

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APPENDICES

APPENDIX 1. CRM user guide

SERRES

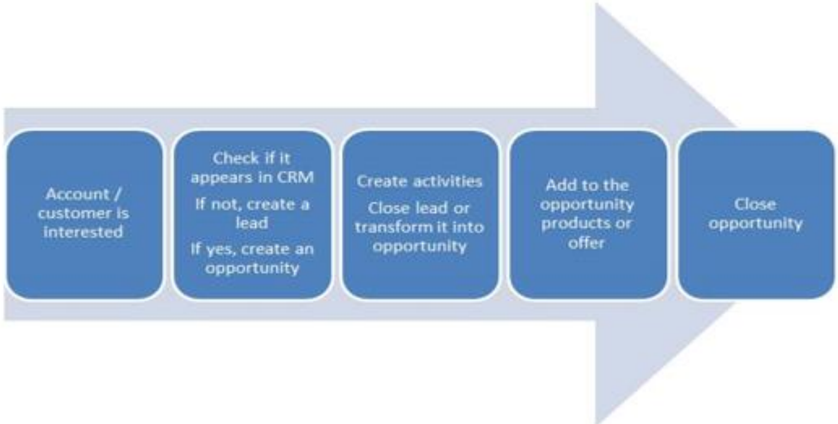
CRM USER GUIDE

SERRES

CONTENT

GENERAL INFORMATION

Record all important conversations, communication or other information of the customer in CRM. This will help you and your team members to keep track of all the interactions with the customer.



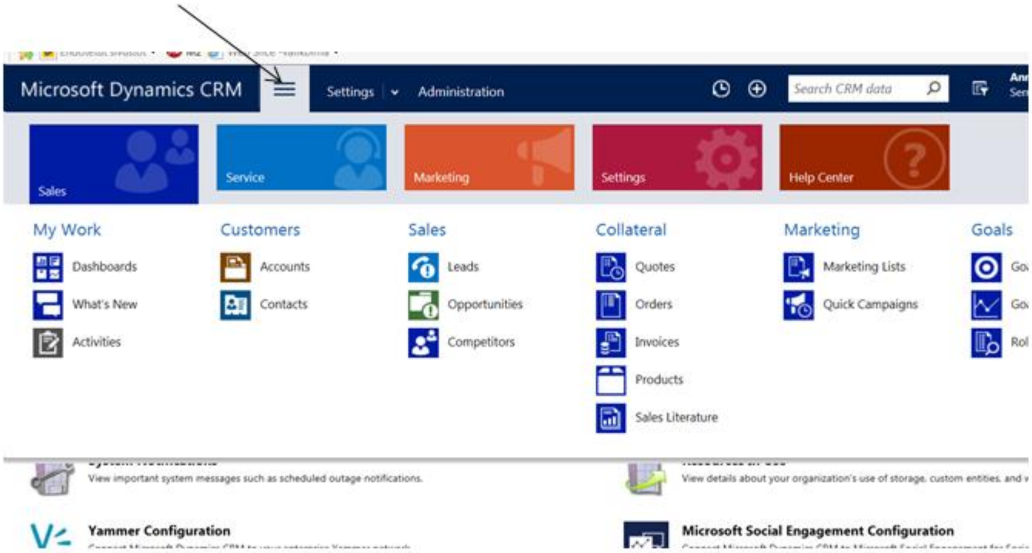
Leads are for potential sales. You can enter leads e.g. from business cards, generate them from marketing campaigns or inquiries from your website, buy them in mailing lists etc.

Opportunity is a deal that you're ready to close.

CRM is devided into business units, Serres Oy for Finland and distributors and Serres Inc. for US. You'll see the BU under your name.
You can use CRM through Outlook or portal.

SIGN-IN PORTAL

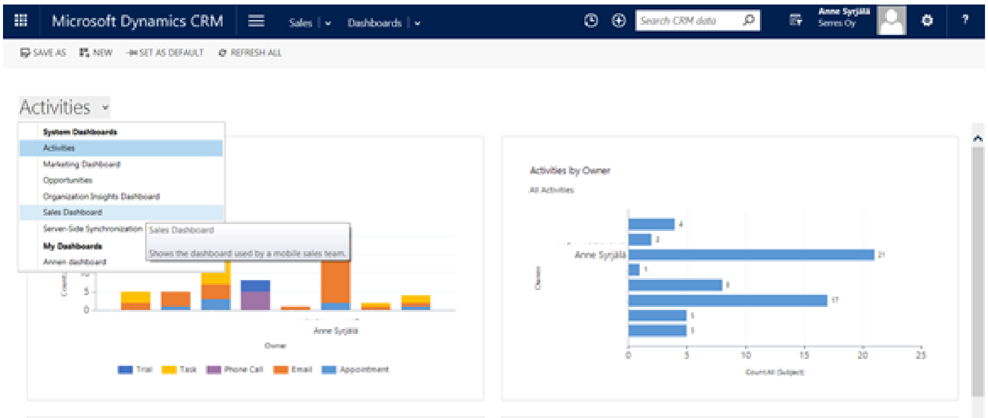
Go to main and choose your work area.



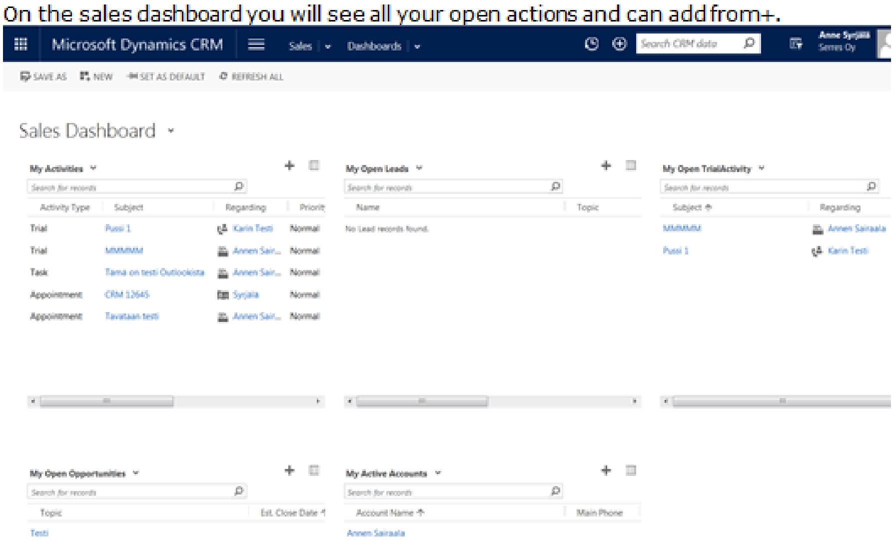
SERRES

DASHBOARD

By clicking ˇ you'll find sales dashboard and readymade charts of Opportunities. You can create your own dashboard from new.



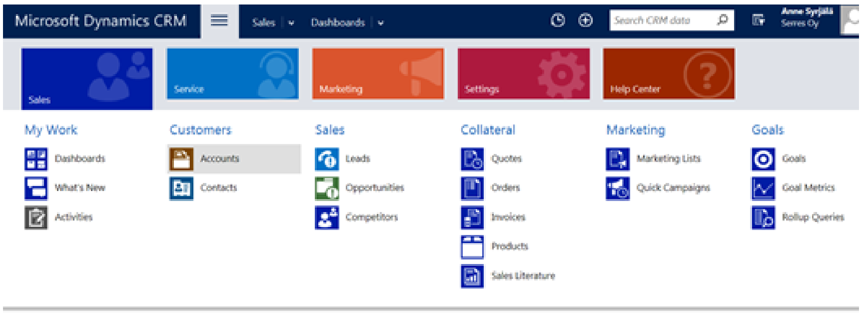
On the sales dashboard you will see all your open actions and can add from+.

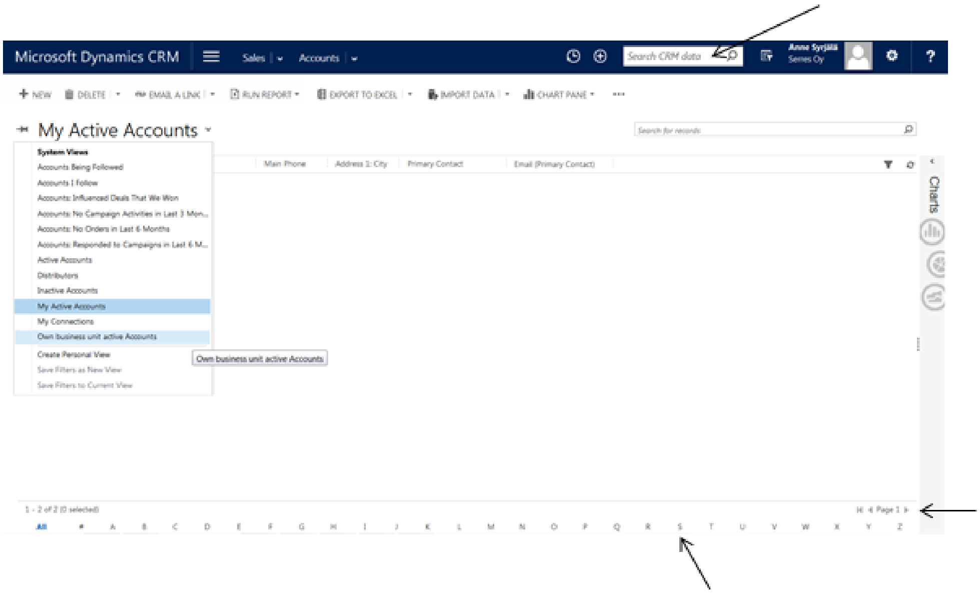


SERRES

ACCOUNTS

Choose customers, accounts. *My Active Accounts* shows the accounts which are owned by you, *Own business unit active accounts* shows all BU active accounts that you belong to and an *Active accounts* shows all active accounts in both BU's. Search an account by using search or the alphabets and the pages. Create new account from New.

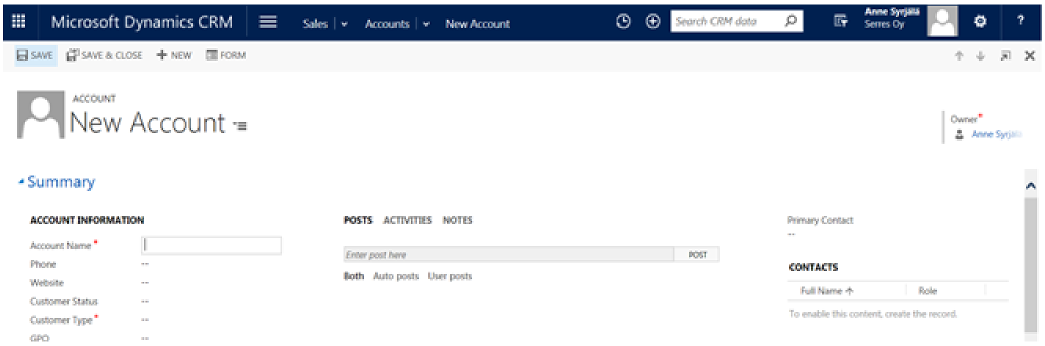




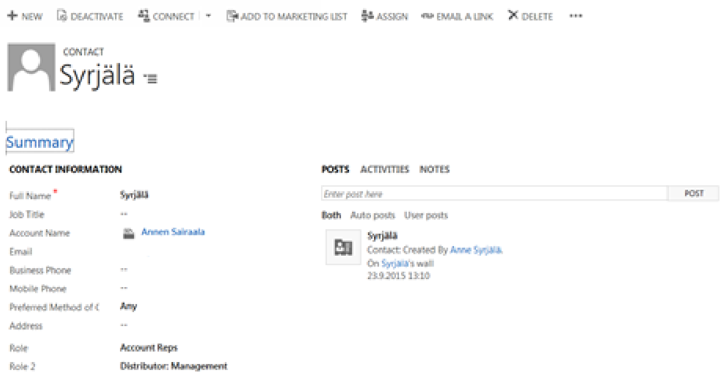
SERRES

ACCOUNT INFORMATION

Fill in the account information and save

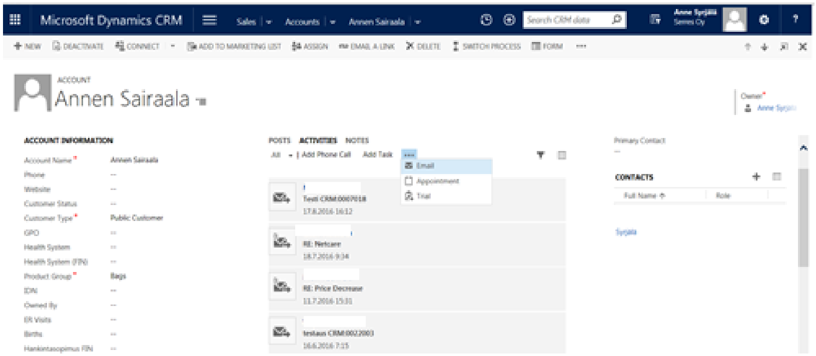


Add contacts from +
Fill in the contact information.
Define Role and/or Role 2, these are used as primary search criteria when making marketing lists especially for distributors. Every contact should belong to an account.



ACTIVITIES

Add activities



- **Email and appointment:** Propably you use Outlook for these. If Outlook and CRM are syncronized, you are able to track these from Outlook.

- **Notes:** Save your travel reports and other documents here. Add any important information that might be useful to others. Titles for documents that should be used (to ease the advanced search)
  - Travel reports: Travel report country yyyymmdd
  - Distributor profiles: Distributor profile country yyyymmdd
  - Annual plan: Annual plan country IP yyyy or Annual plan country Nemo yyyy
  - Customer visits (US): Customer visit hospital yyyymmdd
  - Training: Training hospital yyyymmdd

  in Finland:
  - Asiakasprofiili: Asiakasprofiili asiakas vuosikkpp
  - Asiakaskäynti: Asiakaskäynti asiakas vuosikkpp
  - Koulutus: Koulutus asiakas vuosikkpp

- **Trial:** Fill in the information and save. Mark complete when the trial is over.

- **Task:** can be a reminder for you or you can assign it to someone else. Mark completed when done.

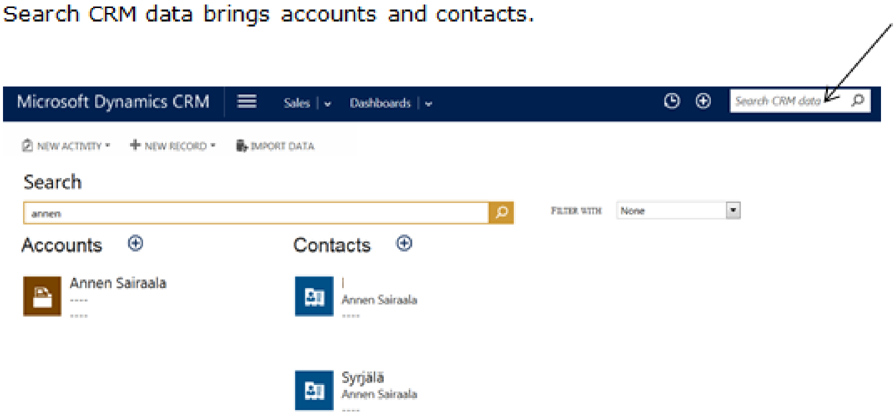
SERRES

- **Phone call:** Choose your contact and add a phone call. Mark completed when done.

SERRES

SEARCH

Search CRM data brings accounts and contacts.

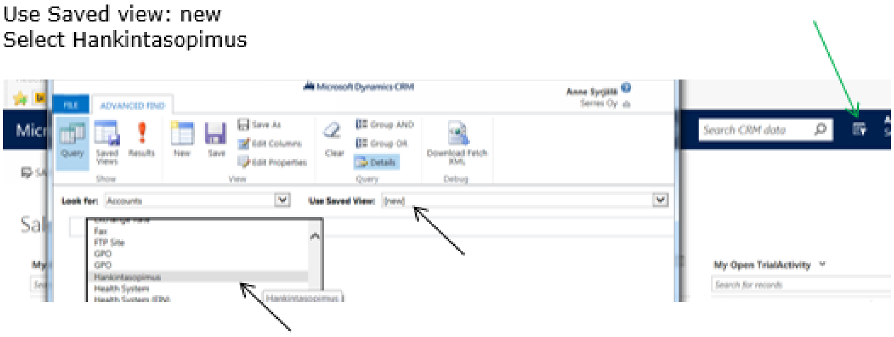


SERRES

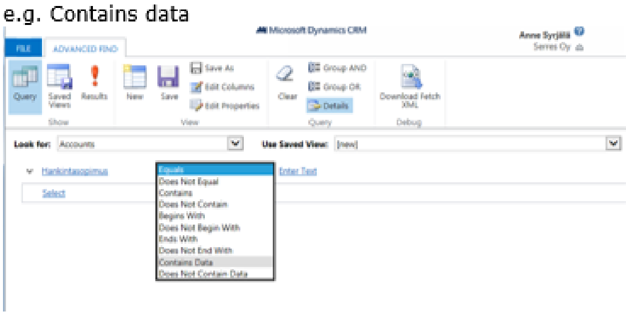
ADVANCED SEARCH

Click the advanced search and choose what you look for.

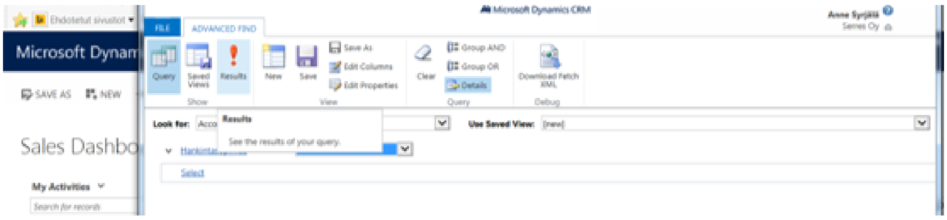
For example finding accounts with hankintasopimus
Look for: Accounts
Use Saved view: new
Select Hankintasopimus



Choose variable
e.g. Contains data

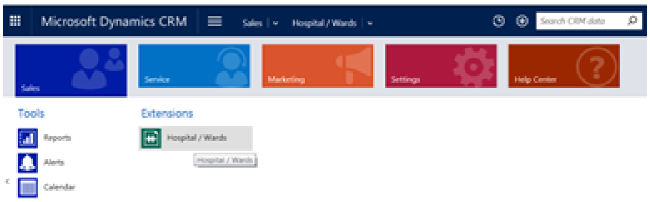


For to see the results, click the Results.

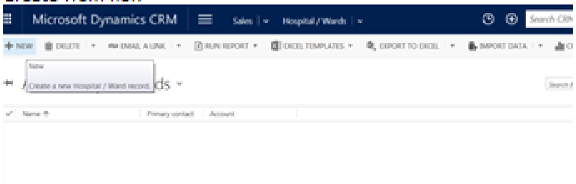


HOSPITAL / WARD

Adding a hospital (distributors) or a ward (FIN and US) under an account. Go to



Create from new

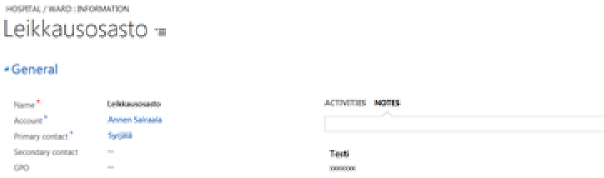


Add information. Account is the account (distributor or end customer in FIN and US) that the hospital / ward is under.

You can look up and choose primary and secondary contact.
Before you can do that, contact needs to be created under the account if it does not exist (see account information).

For contact that goes under distributor and is connected to Nautilus choose role Nautilus: End customer, otherwise leave the role empty

You can add activities or notes to Hospital / ward the same way as to an account.



APPENDIX 2. Plan for CRM theme weeks

KESÄKUU 2016

KUUKAUSINÄKYMÄ

MAANANTAI	TIISTAI	KESKIVIIKKO	TORSTAI	PERJANTAI
		1	2	3
6	7	8	9	10
Check and update your accounts and contacts. Try to do a search and advanced search.				
13	14	15	16	17
Add activities to your account / contact. Phone calls, appointments, email.				
20	21	22	23	24
Add a note., e.g. the lates travel report to your account. Make a task.				
27	28	29	30	
Let's see how does it work through Outlook				

APPENDIX 3. Semi-structured interview

THEME INTERVIEW

- ✓ Collecting customer information
  - what kind of information, besides basic
  - how is it collected
  - ERP <-> CRM
- ✓ Saving customer information
  - where
  - usage of CRM; obstacles
- ✓ Utilizing customer information
  - for what purposes
  - information needed for reporting / statistics
  - analyzing
- ✓ Customer management
  - sustaining customer relationships
  - customer follow-up
  - processes

APPENDIX 4. Internal trainings

INTERNAL TRAININGS FOR USERS

Day	Agenda
24.8.2015	CRM training
7.12.2015	meaning of CRM
17.12.2015	what are things that CRM can be utilized
17.2.2016	how to put in (in what format) information
14.3.2016	changes in CRM (after main user training)
17.8.2016	training of new sales person
22.8.2016	training of new sales persons
9.9.2016	need for add in distributor's customers
28.9.2016	structure change in CRM, activities
10.10.2016	training of marketing person
14.10.2016	CRM activities
3.11.2016	follow-up