CRM Software Selection to Visma L7 ERP system

Case: Mesvac Oy

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Abstract

We are living in a world where digitalization has affected our ways to do business and how it changes norms of sales and sales management. It's also made possible for companies to utilize value creation in their platforms. It's important that companies understand and identifies how this can be harvested to support their business. The main aim of the study was to examine which CRM-software was most suitable for Mesvac Oy. Examination included needs and limitations of the case company.

A quantitative research method was chosen to gain data from CRM vendors and key executives. Qualitative research method was also used to gain validity for results. Action research was selected as methodology since it enables the researcher to be personally involved in the process. By employing this methodology, companies' processes can be improved through action and it also gave theoretical knowledge, which will ultimately be beneficial to the company and to the employees. Research included data from six different CRM vendors and selection method was based on theoretical framework. Data collection methods, such as questionnaires, observation, interviews, were used to increase the reliability of the study.

The results showed the most suitable vendor for the case company. Result also showed the complexity of CRM implementation to current ERP system. The study also indicated that there are areas for improvement such as implementing all processes to CRM to gain full benefit of the system.

The thesis' proposes actions for improvement, and how to implement these actions including suggestions for future research which is focusing on future challenges of the company and how to be prepared for these challenges.

Keywords/tags (subjects)
Customer relationship management, sales management, enterprise resource planning, value creation

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Tiivistelmä

Elämme maailmassa missä digitalisaatio on muovannut tapaamme tehdä kauppaa ja kuinka se vaikuttaa myyntiin ja myynninjohtamisen tapaan toimia. Tämä on myös samalla tuonut mahdollisuuksia yritykselle hyödyntää arvon luomista. On tärkeää, että yritykset ymmärtävät ja tunnistavat miten tätä voidaan hyödyntää heidän liiketoiminnassaan. Tutkimuksen päätavoite oli tutkia mikä CRM-ohjelma olisi sopivin Mesvac Oy:lle. Tutkimus sisälsi yrityksen tarpeet ja rajoitukset.

Määrällinen tutkimus valittiin tietojen saamiseksi CRM toimittajilta sekä avainhenkilöiltä. Laadullista tutkimusmenetelmää hyödynnettiin myös tuloksien oikeellisuuden saamiseksi. Toimintatutkimus valittiin metodologiaksi, koska se mahdollisti tutkijan mukanaolon henkilökohtaisesti tutkimustyössä. Toimintatutkimusta käyttämällä yritysten prosesseja voidaan parantaa toiminnalla ja se myös antoi teoreettista tietoa aiheesta sekä yritykselle, että sen työntekijöille. Tutkimus sisälsi tietoa kuudesta eri CRM-toimittajasta ja valinta menetelmä perustui teoreettiseen runkoon. Tiedonkeruumenetelminä käytettiin havaintoja, kyselylomakkeita ja haastatteluja.

Tutkimuksen tulokset osoittivat sopivimman toimittajan toimeksiantajalle. Tulokset osoittivat myös CRM-toteutuksen monimutkaisuuden nykyiseen ERP-järjestelmään. Tutkimus osoitti myös parannuskohteita kuten kaikkien prosessien vieminen CRM-järjestelmään, jotta maksimaalinen hyöty voitaisiin hyödyntää.

Tutkimuksessa on annettu parannusehdotuksia ja ehdotuksia, joilla nämä voidaan toteuttaa. Tutkimus sisältää myös ehdotuksia tulevalle tutkimukselle, joka keskittyy yrityksen tuleviin haasteisiin ja kuinka varautua näihin.

Avainsanat (asiasanat)

Asiakkuudenhallinta, myynninjohtaminen, toiminnanohjaus, arvon luominen

Muut tiedot (salassa pidettävät liitteet)

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1 Introduction

Sales is one of the main pillars for successful business and it will continue to do so in the future. Today sales had to conform to digitalization and adapt to new era. Still the basic principles are still in the core of the sales. Get lead, study company and their business model, contact, book an appointment, make good first impression, find out the pain spots by asking, give your value proposal to the pain with extra sauce, close the deal and follow up your new client. Sounds easy when you put it like that, but it is something else.

Today's people are even more price-conscious than before, because they have all the data of internet just in their pocket. This makes todays sales even harder than it was before. Sales must give customer something that they do not find online. That's great value proposition which comes from your expertise, knowledge of your customer's business and finding win-win proposals which fit's to customers agenda. These are more valuable than customer even can assume. These proposals can give customers solutions or alternatives which will benefit both companies and create opening for long partnership.

Unfortunately, today's customer will make these openings even harder by communicating facelessly with email or chat, which make influencing and getting to know each other even more difficult. Appointments are hard to arrange, because customer can just ask offer and make decision by e-mail. And when you do get appointment sales should take every drop out of it.

Here are just few reasons why sales should be using CRM on their daily basis to record every appointment, detail about company and about people. Salesmen also have silent information, which is valuable to the company, and so when salesman retired or change workplace it will stay in the company. CRM-system also gives working guidelines, unifies way of working and give data which is measurable and manageable at same time. In the right use of CRM it will add more efficiency to sales and whole organization, which is vital in tightening market situation.

One reason for choosing this topic as research was to is to find out reasons why Mesvac Oy hasn’t implemented pure CRM instrument in beforehand, even thought there are many researches that proves the benefits of this instrument. According to Mohammadhossein and Zakaria (2012, 1584) managers and owners are gradually convinced about using CRM in their company to improve revenue and profit, customers retention and satisfaction and quality of products and services. Fully implemented CRM can also streamline sales processes and lift motivation of the sales team.

Hendricks, Singhal and Stratman (2006, 69) pointed out that their research of impact of enterprise system on corporate performance included SAP, Oracle, JD Edwards and Peoplesoft ERP systems.

Even though there are multiple researches about CRM implementation to different ERP systems, there aren’t any research which include implementation to Visma L7 ERP system. This research will give reader a deeper understanding of CRM implementation process to Visma L7 ERP system and opens the limitation of current system to other Visma L7 ERP users.

Author focus was to find out the solution for current situation and the same time considering the possible limitations of case company.

This thesis is focusing on selection of Customer Relation Management system in Mesvac Oy. Thesis is case study in Mesvac Oy. This research also positions itself in marketing discipline and deepens into the interfaces of sales and customer relationship marketing.

1.1 Background

Sales has changed a lot from history. 1900 century sales gentleman changed to unethical “bunk” which closed the deal in a way which did harm customer. This put conman label to most of salesmen for many years. Even for today you there are customers that applies for this, which has long roots from previous sales generation.

Change for these old habits started in 1980 and it has developed on 1990 to the from which we can recognize even today. This next generation started to focus on solution-oriented selling and value creation.

Today sales have come more and more transparent and “conmans” has almost diminished from B2B field. The main reason is mainly because of increase of customers know-how and collaboration among customers. Internet and specifically social media have given more power to customers, which has also changed the way how B2B has evolved.

Transparency, functionality and value-creation has become norm where there isn’t room for major dishonesty or “old-school” salesmen, which provide product or service that you don’t need.

Preconceived people are still there, but todays way of selling is more like authentic selling which require to knowing what the core selling is: providing solutions to people’s problems. Selling is to find people who need your product or service and show them how they can help them or their business.

Biggest changes come from individualization which requires new way of thinking in sales. Nowadays people want to have as much choice and control as possible, which means in sales that different customers want to be engaged in different ways, to different degrees, at different times.

This means that there is huge need for information gathering and analysing which sales should adapt and if that information is only in salesmen’s head if is also huge risk in company’s point of view.

Also new technological advances have risen to conquer the time limitation which is today one of major reasons to reject your sales appointment. For example, webinar can give you change to provide your presentation even though individuals are in their home, rather than requiring a visit at your office.

As mentioned in introduction people today are more aware of other options and digitalization and information from internet has pushed also sales to focus on content marketing which provides value to the sales process. Quality content marketing material can provide informative, helpful information to ease customer purchasing decision. Even though it doesn’t focus on to make direct sales, but it will lift your brand value which will help sales during problem solving process.

As digitalization and sales automation growths salesmen must change their salesman profile to business and domain experts. Today’s best salesmen can be described often consultants of their main area. This also needs providing customers the know-how about new product development to show that your company is continuing to develop something new and interesting.

Using new technologies such as WhatsApp, will shorten significantly sales cycle than using e-mail or phone calls. This also creates enjoy for the users because of greater degree of privacy.

Also, consumers will be more demanding in future. Live chat is remaining their competitiveness. Demand for live chat grew by 8,3% in 2017, which means customers demand for immediacy and alternation for phone communication.

Also, the new era of customers is rising: The Millennials. Millennial's approach the buying process with unique mindset of millennials rely heavily on peer reviews and seek more information on products and companies from social media.

According ITSMA's How to Buyers Consume information survey: 70% of buyers want to involve sales rep during the exploration stage. Forrester study suggest that salespeople are not as valuable as they used to be, even though overall value has not decreased. Main reason for this is that salesmen role is no longer to teach clients about product, but to make it fit to their situation. Buyers want customized solution that is tailored to meet their needs. Gartner research shows that buyers are no longer moving through funnel one step at a time, but parallel process which includes exploration, evaluation, engagement and experience.

The most influential activity is still direct interaction to connect with buyer.

Figure 1. Most Influential B2B Marketing Activities (Armstrong 2013)

1.2 Motivation of the research and introduction of the case Mesvac Oy

The benefits are multiple from successful CRM system implementation but the degree to which they are successful is not as high as it should be. Loh, Koo, Ho and Idrus (2011, 248) pointed to report made by Gartner group which stated that 55 percent of all CRM projects are failures. Earley (2002, 27), stated that up to 75 or 85 percent of the CRM implementations can be considered failures. Therefore, it is beneficial to study the factors that can help a company to be successful in CRM system implementation.

Customer relationship management is among the fastest growing management approaches and more and more companies are adopting that approach as their way of doing business (Adebanjo 2003, 570).

Regardless of the size of an organization, businesses are motivated to adopt CRM to create and manage relationships with their customers more effectively (Ngai 2005, 587). Nitzan and Libai (2011) states that organizations should be interested in CRM because of its possible implications for better understanding and prediction of customer retention. Over the past two decades, practitioners and scholars have paid considerable attention to customer retention and its antecedents and consequences, primarily because of the impact of retention on customer lifetime value and consequently on the firm's bottom line. (24.)

Mesvac Oy

Mesvac Oy was founded in 1977. In early years their business focused on manufacturing sectional doors and importation of pressure washers. In 80’s Mesvac Oy focused their business only in sectional door manufacturing. Mesvac Oy made major changes in next few years through acquisition and different company arrangements, which gave them access to high speed doors, folding doors and carage doors. In 1989 Oy Brandt Ab bought Mesvac Oy and they got access to loading docks and air curtains.

In 1998 Mesvac chose Visma's Visio 3 as their ERP system, which updated to Linos 6 version and later in 2006 into L7. (Meriluoto, Silvan & Kuusrainen 2020)

In 2003 Mesvac started co-operating with Hörmann and new maintenance division was created. Fire doors were included to portfolio in 2005. After 2009 recession Mesvac Oy had to find way to be renewed. Mesvac changed from pure sales business to service business.

Latest change happened in 2016 when Hörmann Group bought Mesvac Oy from Brandt Group. Today Mesvac Oy have to main income streams, which consist of sales and maintenance services. Mesvac also has production department, which includes manufacturing such as Rulosec, planning services, and order department. Mesvac also have Held Desk activities, accounting and business and development departments.

Hörmann Group is largest manufacturer in Europe and has 28 production facilities in Europe. Turnover in 2018 we're over 1 billion. Hörmann main product group is carage doors. (Mesvac Oy 2020.)

Today Mesvac Oy is still using Visma L7 ERP system as their main system. It has been updated by custom made solution called LTR (finnish translation: Liikkuvan Työn Ratkaisu), which is web-based offer calculator and order managing tool for sales. LTR has some CRM abilities; such as customer register, offer calculator and order management, but it is not "pure" CRM software now. At currently Mesvac Oy's LTR doesn't have any type of work/task related process, which could give more customer information to other organizations and to guide salesmen to streamline their used time on customer. In industrial sector offering process can be seen only in advance offer, normal offer to order. Functions such as contact, conversations, timelines and feedback can't be seen in LTR. (Kuusrainen 2020.)

It is tailored for Mesvac Oy and implemented to Visma L7 ERP system where all the data comes from. LTR has its own configurator, which use ERP: s data base for offer calculations. Every product segment has own calculation formulas which has been developed and updated from day one. The main problem of this calculating system is delays which comes from the history data of ERP and from the calculation formulas. (Meriluoto 2020.) Visma L7 ERP haven't designed for such use and it basic function of calculation is that it will calculate every single formula that has been written behind calculator after giving the base information. (Figure 2)

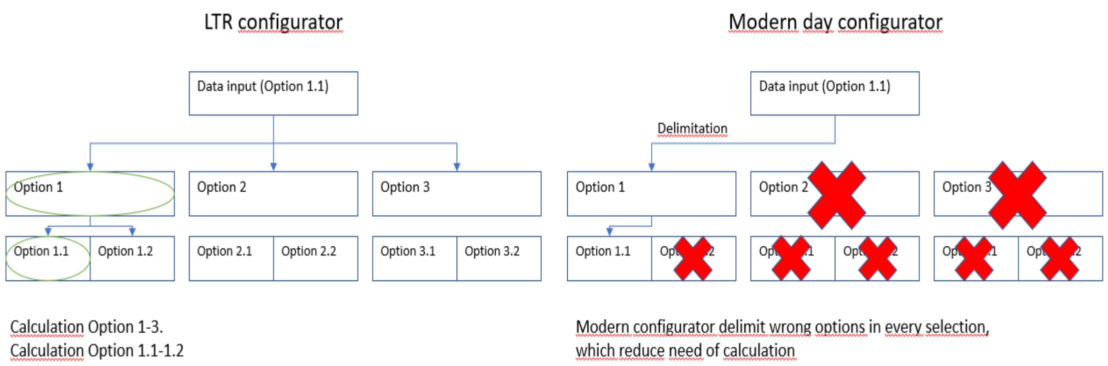

Figure 2. LTR configurator versus modern day configurator

Configurator's main functions are leaned and quite easy to use. Even though it requires lot of product know-how to handle and allows some mistakes the main problem is that calculations delays. According to IT Manager (Meriluoto 2019.) current situations has been improved after deleting recent history from data base. Meriluoto points out that delays in the ERP system mainly are related to huge amount of history which are in the current system (Meriluoto 2020.)

Even though offer calculating brings challenges to sales process, the change from offer to order sheet is handed quite easily. LTR gives tools for offer calculation and confirming offer to order. At same time it will create running order number from ERP system and remove it from offer list. Before order approval sales can make changes to order at this point. After approval changes must make through order processor. That’s because LTR will lock it down after releasing order forward.

Offers (starting with M1-combination) and orders (M2-combinations) can be searched through multiple different options. Figure 3.

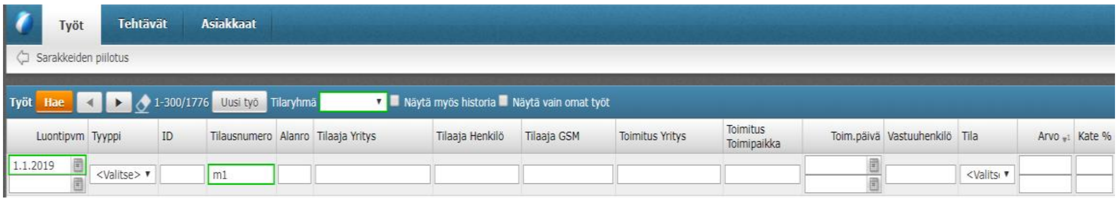

Figure 3. LTR search bars

Main problem of current LTR is the lack of follow up functions for sales, service sales and sales management. Every piece of information during sales process after offer is guided by excel sheets in service sales. (Lindholm 2020.) Those data sheets are in salesmen own computer or in their notebooks. (Kuusrainen 2020.) In the end data lies in different forms and places which makes it hard to control or use in sales, account management or sales management.

Salesmen has different ways of controlling their projects, follow up data and offers which make it’s even harder to manage. Lack of semi-structured guidance makes sales process more unfocused and inefficient.

Currently follow up reports are sent to sales by Powerplay reporting system, which collect and analyse data from Visma L7 ERP system, such as hit rate, total value of the offers and total value of orders and order backlog. These can divide by salesman and by product group. There are weekly reports and monthly reports, which are more informative.

Visma L7 ERP is designed for contracting, energy companies, industry, wholesale and specialty goods trade and property management. Visma L7 general characteristics are based factors as products and pricing, currency options, installed registers, numbers and documents sets, parametric library for customizing, internationality, transfers from / to other systems, queries and searches and reporting. (Visma L7 järjestelmänkuvaus 2020.)

Visma LTR benefits are based to information flow from people from outside office to office workers. It also includes real time information from the field and ERP benefits can be used also on the field. User uses web browser which have access to ERP system. Added information is added to database and/or delivered to interface of ERP where it can be recorded to ERP system. (Visma Liikkuvan työn ratkaisut Yleinen, 2020.) According to Hakkola LTR reads data from ERP update back is going through webservice and L7 logics. Now and in the future Visma is using more rest type interfaces. (Hakkola 2020.)

LTR is also described as sales tool which offers possibilities to create and implement beneficial sales processes such as information from customer company, contact person, customer-specific work and their tasks, documentation (sales orders etc). (Visma Liikkuvan työn ratkaisut Myynnin työnohjaus 2020.)

1.3 Research Questions

Based on previous sections, case company want to research which CRM application can be installed to current ERP system. There isn't any previous study or investigation which currently available CRM systems meets the needs of this company.

The research is continued by presenting the following main research questions and sub-question:

Main question: Which CRM system is most suitable for at current needs of Mesvac Oy?

Sub-question 1: How can CRM be integrated to Visma L7 ERP system?

Sub-question 2: What are the benefits of new CRM in sales and in sales management in Mesvac Oy?

1.4 Structure of the thesis

After the research introduction in chapter 1 the research will continue to literature review in chapter 2. In order to understand a theory of sales management, customer relationship management and customer relationship management software setting the boundaries for the present study, it is beneficial to explore main concepts and their definitions in the beginning of the chapter 2.

The goal of this literature review is to go through existing theories and concepts of the themes mentioned. In the three chapter below, terms of sales management, enterprise resource planning and customer relationship management are defined. The theoretical framework that is presented in the end of this literature review. The theoretical framework is based on the definitions, theories and concepts found.

Chapter 3 is about the research methodology. This chapter includes descriptions of research approach and context, how the data was collected and analysed and verifications of the results. The chapter 4 defines the results of the research. The chapter 5 is the end discussion where are the answers for the research questions, practical implications, assessment of the results in the light of literature, limitations of the research and the recommendations for future research are presented.

2 Literature Review

This section discusses different definitions of sales management, customer relationship management and customer relationship management software.

2.1 Sales Management

In this chapter author points out the importance of CRM to sales management and how it can be part of motivating sales team. These key elements are in main role in order to successfully implement CRM to the company.

Great sale manager communication and listening skills effect significantly on salesman’s ability to function. These abilities can promote salesman’s customer relationships, work performance and it also shows satisfaction to sales manager (Goebel, Deeter-Schmelz, & Kennedy 2013, 17).

According to Jobber and Lancaster (2019) and Rubanovitch and Aalto (2007) sales management is responsible for financial profitability, they’re also responsible for the performance and wellbeing of his subordinates. Subordinates are dependent on their supervisor and therefore the sales manager must be careful that the performance of day-to-day affairs does not result in negligence of management, as it is leadership that is the most important role of the sales manager. As a sales manager you don’t just have to organize, motivate and guide everyone working in your sales team to achieve the performance targets set by the company, but also to ensure that they lead customer relationships in a way that builds trust and meets all the goals of the organization ethically and responsibly. (Jobber & Lancaster 2019, 299; Rubanovitsch & Aalto 2007, 20.)

Great Sales Manager

Good sales manager knows how to take responsibility for a company's productivity, personnel and whole business. A good sales manager must have knowledge of the industry, an attitude, knowledge of sales and its management, as well as a desire to develop. A good sales manager has also the ability to inspire and encourage staff to have a positive mindset. There are necessary to arouse the desire and will to achieve better results. The modern leader also shows by his own example concretely how the set goals are achieved. (Rubanovitsch & Aalto 2007, 23, 41.)

As mentioned above good sales manager needs to desire to develop sales processes to achieve more productivity and profitability. To be good sales manager, sales manager needs to have tools to approach the next level of sales. This research is Deeter-Schmelz, Goegel and Kennedy (2008) point’s out on their research how sale manager and salesman differentiate good features of great sales manager. Figure 4 shows that there is general agreement on the qualities of a good sales manager.

Features	Explanation	Leaders	Saleman
Listening and communication skills	He should be good at talking, but also listening	1	1
Human relations	He should work smoothly with different people	2	1
Organization and time management	He is good at organizing things and has good control over his own time	3	5
Knowhow	He has the knowledge and skill to work in a job and he knows the industry	3	1
Couching skills	He has the skills to drive sales development and results	5	7
Motivation skills	Can identify the right means of motivation and rewards good work	6	4
Honesty and ethic	He acts properly ethically and is honest	6	8
Sales skills	He has sales skills and experience as a salesman	8	-
Leader skills	He has the ability to lead and inspire his team	8	5
Delegation skills	He knows how to share responsibility with sellers	10	5
Flexybilitys	He is ready to be flexible	-	9

Figure 4. Good features of sales manager
(in accordance with Deeter-Schemtz, Goebel, & Kennedy, 2008, 12)

Only sales managers did not consider adaptability so important and salesmen did not list sales skills as important attribute. Sales managers chose communication and listening skills, organizational and time management skills, interpersonal skills, and knowledge management as the four most important attributes. Salespeople were very unanimous but replaced organizational and time management skills with motivational skills as one of their four most important characteristics. (Deeter-Schemtz, Goebel, & Kennedy 2008, 12.)

Sales strategy

One of the most important aspect of sales management is sales strategy. Thoroughly a honed sales strategy is the foundation of all sales management and the key to achieving growth. A sales strategy is the process of determining who a customer is, what company they have offers and how the sale takes place. Defining a strategy is important because the business environment is constantly changing, which requires regular decisions to change our own business practices as well. Instead of just short-term goals and plans, it is needed also a long-term plan, i.e. strategy. Strategic analysis is needed to understand the real problems and needs of the market.

Strategies guide us to how we can achieve the desired goals. All performance standards must be met through the sales organization. The sales strategy and derived sales program must be coordinated with sales measures and the sales organization. (Marcos Cuevas, Donaldson & Lemmens 2016, 113; Chunawalla 2009, 269.)

In many cases, the most critical step in developing a sales strategy is its implementation. There is a big risk that the established sales strategy does not materialize in practice and a great deal of work is wasted. This has a negative effect on staff frustration and a loss of credibility for the customer from view. It is important for the success of the strategy to pay attention already at the strategy planning stage, that the strategy is easy to understand and that the goals are clearly broken down on a monthly and annual basis and that sales management is 100% committed to the strategy and its management. In terms of strategy implementation and monitoring It is important that the strategy monitoring system is effective to ensure that the strategy is implemented can also be tracked in as real time as possible. (Rubanovitsch & Aalto 2007, 44.)

According to Leight & Marshall (2001) in sales strategy point of view key aspects is to decomposition of the overall selling process into subprocesses that can benefit and from specialization and division of labour. Leight and Marshall also points out that all longer-term goal is to build an infrastructure that operates on “intelligence of the system more than the ‘talent’ of the user. (Leight & Marhall 2001, 88.) Customer-oriented company’s mind set be must include to company’s business model and into company’s sales strategy.

Motivating Sales Team

Motivating salespeople is a critical part of managing a sales organization, given its significant impact on sales results. Motivation deals with the reasons for people’s behaviour, it seeks to explain why we behave in a certain way in different situations. In order to understand motivation, one must be able to identify a person's psychological and physiological needs, as well as external situation requirements. Different theories of motivation try to explain our behaviour and these theories have been applied to everyday activities such as eating and eating, drinking, but emotions are found to be very difficult to define, as the expression of emotion is very individual. Therefore, understanding the motivational factors has been perceived as difficult. However, every individual has things and stimuli that motivate them. (Gorman 2004, 7.)

According to Avlonitis and Panagolous (2005, 364), CRM system can create intangible benefits, such as smoother interaction between departments, enhancement of the company and employee motivation.

Since the sales manager is meant to motivate salespeople, it is good for the sales manager to know and identify some underlying motivational theory that can be used to identify the factors that influence motivation. One theory that explains motivation is Maslow’s hierarchy of needs. In 1943, Abraham Maslow wrote a psychological article entitled “A Theory of Human Motivation ”. The article reported on a progressive, hierarchical, pyramidal approach that explains a person’s intrinsic motivational factors. (Marcos Cuevas, Donaldson & Lemmens 2016, 73.)

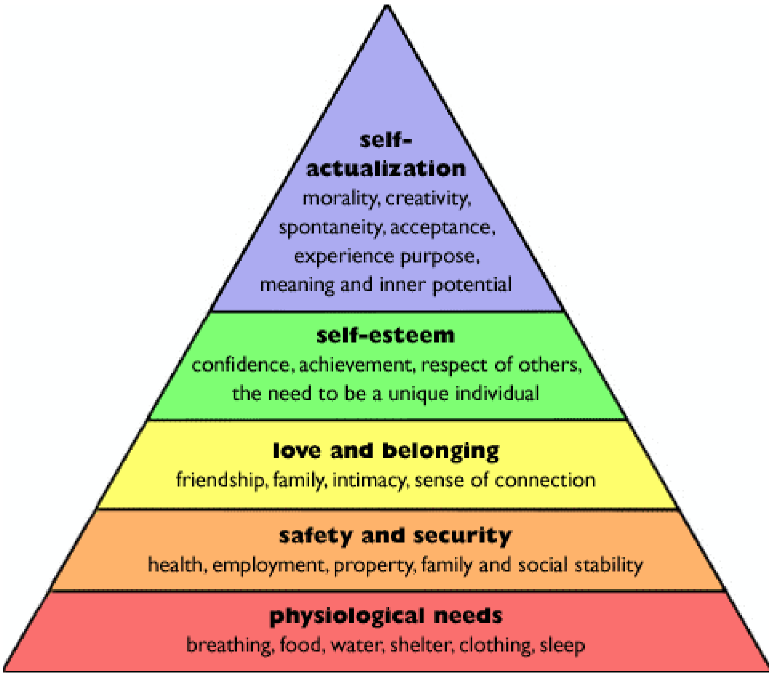

Figure 5. Maslow's hierarchy of needs (Marcos, Cuevas, Donaldson & Lemmens, 2016, 73)

Figure 5 shows the pyramid of Maslow’s hierarchy of needs. Physiological needs are a priority at the bottom of the pyramid. These are essential for man to survive in terms of. These include, for example, basic human needs such as the need for food and water. The next level up in the pyramid is security. These include the need to protect against enemies and immediate dangers. The third level of the base is community needs and emotional life. People are social animals and they need others like family and friends to accompany. The fourth level involves self-esteem and gaining appreciation from others. This is related to one's self-esteem and, for example, success in working life. The formation of a personal identity is important to people because no one wants to be the same as anyone else. At the top of the pyramid are the needs for self-realization. It is said that this need is never actually met but is actively pursued meeting other needs. When looking at these layers, it must be borne in mind that that the elements of motivation are met in order. For example, without meeting your physiological needs, it is unlikely that you will be able to form social groups. If looking at this from the top down, self-realization cannot take place without the other preceding points. However, it can be said that there are exceptions to this rule. For example, someone may sacrifice their own safety or well-being for someone else, such as a child or for the benefit of a loved one. In this case, he is motivated by the actualization itself before security. Although this hierarchy illuminate’s motivation and emphasizes the importance of self-realization as a motivator, research is still limited. (Schwartz 2006, 100-101; Marcos Cuevas, Donaldson & Lemmens 2016, 73-75.)

Many sales managers often think, "Why aren't salespeople more productive, do we pay them a good salary, offer good working conditions and excellent fringe benefits and employment security?" However, sellers are often reluctant to do anything more work or give more of themselves than is necessary. The general assumption is that if a person is paid a good salary, he will do a good job. Contradict this with the assumption, for example, is that churches, salvation armies, and volunteering generally employ highly motivated people who may not receive any financial compensation. Therefore, to motivate sellers must invest in ways other than financially. (Chunawalla 2009, 216.)

According to Jobber & Lancaster (2019) one major debilitating factor for sellers is that sellers ’self-confidence and positivity are constantly undermined by the inevitable rejection of buyers as part of their day-to-day operations. In some sectors, particularly life insurance and the financial sector, rejection can far outweigh success, so the motivation to continue can be challenging. The sale is hard work. Often the salesperson works alone and the relationships with customers are described sometimes as a struggle rather than a collaboration. The inconvenience is also that the seller and the supervisor are usually geographically separated, so the seller may feel lonely or even neglected if they do not get the support they need from sales management. An important part of the seller guaranteeing success and maintaining motivation is a good knowledge of the seller. The supervisor is important to know their sellers as individuals, to know their personality and values. Human knowledge is important for that, because in a sense, sales managers are not motivated sellers, but they only create conditions that encourage sellers to motivate itself. Improving motivation is important for successful sales because of research have shown that high motivation leads to increased creativity, smarter, work, increased diligence, development of self-esteem, negotiation tactics, healing, a more relaxed attitude and better relationships. (Jobber & Lancaster 2019, 346-350.)

Several studies have considered what motivates sellers in practice and the results show that these motivators have changed considerably over time. This is partly due to improvements in sales management and, in part, a better understanding of what really motivates the salesperson in practice. Increasing and maintaining seller motivation does not be the easiest task. Motivation is promoted through, for example, recognition of work done, various incentives and rewards, and training to help achieve achievement. The basic assumption is that sellers are motivated by a monetary reward doesn’t apply to that extent either, as the hardest working sellers say they enjoy more about achievements and won deals and specifically about what they can do make their customers happy. These motivational factors are internal, i.e. inherent motivational factors, such as feelings of self-sufficiency that arise from gaining recognition for one’s accomplishments or the opportunity to progress in the company. Other motivating factors are outsiders, such as getting a bigger car with better rewards or bonuses. (ibid., 346-350.)

According to Rubanovitsch and Valorinta (2009), the seller’s motivation is greatly influenced by rewards. Remuneration practices are greatly influenced by salesperson roles and job descriptions, as well as salesperson goals. Sales management should ensure that remuneration is developed as needed and has the primary responsibility of ensuring that the company has a consistent remuneration system. However, financial rewards alone are not enough, but non-financial rewards must also be considered. (Rubanovitsch & Valorinta, 2009, 108.)

However, the seller's fee should be reasonable, with which the seller will get along well. Premium should be proportionate to performance and should integrate our own goals with the goals of the organization. Most companies pay commissions or bonuses to their sellers. The most common salary model is the basic salary, to which is added the bonus according to the bonus system. This pay model provides the employee with a certain basic financial security and the opportunity to earn more by making more profit. In some companies, sales are paid a commission directly, so revenue is entirely dependent on the salesman's accomplishments. Duly planned payroll model is beneficial to both the company and its vendors. It optimizes the cost of meeting sales and profit targets. When work is properly rewarded, morale and motivation are high on priorities. Remuneration models are catalysts. They are not a substitute for the right motivational plans. However, people do not live just for the money. Everyone wants to achieve something, to succeed and get appreciation. Remuneration models should be properly planned and managed. If provided the pay model and goals are inhuman and not achievable, they will turn against the company. (Chunawalla 2009, 230; Jobber & Lancaster 2019, 352.)

Leight & Marshall (2001, 86), points out key to customer-centric sales strategy one of the critical components of succeed is basing incentive and reward systems on responsiveness to customers as well as profitability. This can be motivational part of use of CRM. According to Lages, Lancastre and Lages (2008, 687), firms can use relationship performance metrics as motivation and reward tool for teams and their managers by relying on comprehensive data. This points out that CRM software implementation can be seen also as motivational instrument to the sales department.

Sales organization management, performance measuring and monitoring

Measuring and monitoring results is one of the key parts of a sales manager's job. Sales manager must see are the key indicators met with performance or is it not. Sellers' performance must be recorded in order, so they can be compared performance to planned goals. Sales management must identify important information that they should follow. Sales data and cost data are two basic pieces of information that managers follow. Other measures of sales include sales revenue, profits, market share and sales growth and volume of existing customers. However, one of the most important monitoring methods is the monitoring of sales reports. Information can also be obtained also through personal observation, such as visits by salesmen and sales managers. (Chunawalla 2009, 268-273.)

The sales manager must also know if the seller is taking the sales action as expected. B2B sales, sales director or sales manager usually holds ongoing concerns sellers existing sales portfolios. The sales portfolio refers to ongoing sales projects and potential customers. It is the responsibility of sales management to ensure that salespeople have all the necessary information related to sales projects. Management is also responsible for monitoring what is going on sales opportunities and their progress and direct vendor resources forward as needed. (Hänti, Kairisto-Mertanen & Kock 2016, 72.)

The vendor tracking system consists of field visits by supervisors and regular reporting. It makes a big contribution to the seller’s evaluation. Reports are basic tools for vendor tracking. The sales manager knows from these reports what the performance of the salesperson is like is. A good monitoring system allows management to make quick decisions to improve sales performance. The seller also benefits from regular monitoring, because he sees his performance in real time and can compare it to goals set and to past performance. It is a great method for self-assessment. A good tracking system plays a key role in sales management, as it facilitates market research, assists the sales manager in decision-making, facilitates the evaluation of sales performance, facilitates corrective action in case of deviations, facilitates sales work planning, has a mechanism for recording the activities of the competitor and matters of local interest and it facilitates the construction of a good database. (Chunawalla 2009, 268-273.)

In many organizations, the performance of B2B vendors is also monitored through a sales funnel (figure 6.). The sales tube can be used to better understand the seller employment and the situation of customers. It is common for a sales pipeline to have a lot of potential customers fed in there and the salesperson starts to go through the pipeline and as the customer progresses move the customer further down the pipeline. Sale pipeline is usually tied to the company CRM system. (Hänti, Kairisto-Mertanen & Kock 2016, 71.) According to Raman, Wittman and Rauseo (2006, 39), CRM allows salespeople to increase their return on time invested in sales activities, example by focusing on high revenue, high profit, and high potential customers while reducing the level of activity focused on low potential, low revenue, and low profit customers.

Figure 6. Sales Funnel

The pipeline is used to monitor, for example, prospected customers, potential customers, ie possible leads, agreed appointments, and the offer portfolio. In practice, the seller to start going through the pipeline by liaising with every sales pipeline company, for example by phone or email. The purpose of this is to map the company's potential to become a customer. So, the seller tries to arrange appointments. Meetings main the aim is to lead to an offer and the offers are intended to lead to a trade.

Once all these steps are broken down in the sales pipeline, the sales manager stays better know the seller's work and customer relationships. The sales pipeline sales manager is also able to easily notice if the seller is not progressing as intended. If the sales management notice that customers are not progressing as desired in the sales pipeline, it is easier for sales management to address the problem and help the salesperson move through the pipeline. For example, if a salesperson doesn’t get enough appointments, it’s good for sales management to support the salesperson during the opening phase. If, on the other hand, the meetings agreed upon by the seller do not produce offers or if the offers do not lead to sales, sales management must also support the seller in developing these areas. (Hänti, Kairisto-Mertanen & Kock 2016, 71-72.)

Measuring and monitoring performance requires an experience-based approach,in order to be able to assess their causes and outcomes. Management, which results in improved sales force performance, requires the setting of standards, these standards comparing the results obtained with each other and taking corrective action, taking into account the individual situation of each vendor. When monitoring sales performance, one must be able to understand the reasons that have led to the results obtained and based on them must be able to justify what needs to be changed. (Marcos Cuevas, Donaldson & Lemmens 2016, 269.)

Most sales managers have two key goals as part of their work: to improve individual performance and achieve sales effectiveness at the organizational level. A personal assessment of salespeople is essential to be able to support the weakest performers and find out the reasons for their performance. Performance differences can also reveal important operational differences between vendors. In sellers ’evaluations, it is important that when designing sales plans, sellers are provided with the most appropriate criteria for them in relation to sales, to improve performance and meet targets. When evaluating performance is several things need to be considered, such as whether to measure unit or set performance. Major some research has focused on individual vendors, but group-based sales have grown significantly over the past two or three decades and are increasingly being used to improve overall performance. (Marcos Cuevas, Donaldson & Lemmens 2016, 270-271.)

The importance of providing constructive feedback cannot be overemphasized. A regular culture of giving and receiving feedback, supports continuous learning and development. It is important for the seller to get feedback so that the seller does not feel indifferent to his work. When giving feedback, the way in which the feedback is given should be considered. It is of great importance how the matter is presented. Especially with regard to negative feedback, it is important get the message across as constructively as possible, so the seller is able to take feedback as constructively as possible and to learn as much as possible from it.

If giving feedback becomes an inappropriate accusation to sales management, from the seller is likely to take a defensive stance. The company is best served by vendors who can receive feedback well and draw on what can be developed for themselves. (Rubanovitsch & Aalto 2007, 175.)

2.2 Enterprise Resource Planning

Enterprise Recourse Planning (commonly known as ERP in finnish language) is a system which manages all the company’s operations. Gartner Group invented term of Enterprise Recourse Planning in year of 1990 (Wylie, 1990).

History of ERP as we know today starting point. It’s divided on four main milestones (Figure 7). First milestone was in 1960 when inventory systems were on their prime.

Second milestone was on the 1970's when material requirements planning (MRI) got more focus was precursor and foundation of MRP II and ERP. Third milestone were development of MRP II in the early 1980's since functionality grew larger and started to meet the requirement of regarding other activities MRP II was devised. The development and spread were also increased by the spread and development of computers. (Jacobs & Weston 2007, 358-361; Kettunen and Simons 2001, 47.)

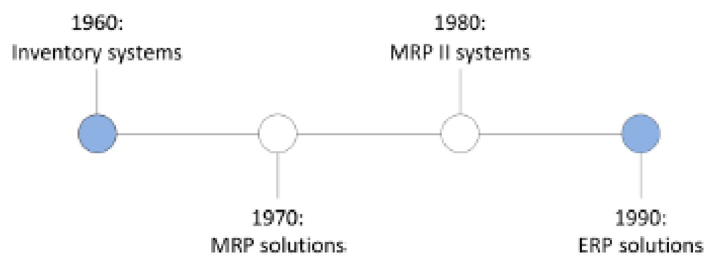

Figure 7. The history of ERP

According to Kettunen & Simons (2001) ERP systems purpose is to integrate company's different area of activity such as planning, manufacture, sales, financial management and project management. Latest ERP systems has modular structure and therefore specific area of activity correspond to a specific module. (Kettunen and Simons, 2001, 48.) Usually company's uses ERP system to control their inner functions such as logistics, production and financial management.

ERP modularity enables to add new area of activity quite easily. At purchase company selects all the modules what they need in their core business and supplier can custom-made solution to the company.

ERP system providers have also expanded their modular to the point that company can almost control all processes through ERP system, which includes also basic functionality of CRM (Williams 2010, 469). CRM and SCM (Selling Chain

Management) key roles are already changing. Davenport has divided ERP system to basic elements where all the information is going to the main database (Figure 8).

In the centre of the system there is one and shared database. Around the database has been build different areas of activity: economic, production, warehouse, human resources, service, sales, delivery and reporting. Clients, suppliers, management and employees all in touch to ERP system through their own surfaces. Example: Customers through sales and service department, where sales and service personnel use sales and customer service modules. Invoicing, delivery and aftermarket are most typical procedures. Nowadays suppliers have straight access to client's warehouses, which indicates automatic orders when quantity of goods achieve critical level or by looking occupancy of the shelf. Production, warehouse activities and delivery have developed to give information such as order completion and shipment to suppliers, but also to end user as well. Reports from financial management can been seen in different departments simultaneously and in real time. Different management levels can access needed level to gain information about their own department's economic figures. Current ERP systems provide information from company level to singular product. This kind of movement through levels is offered easily todays ERP solutions. (Davenport 1998, 123-127.)

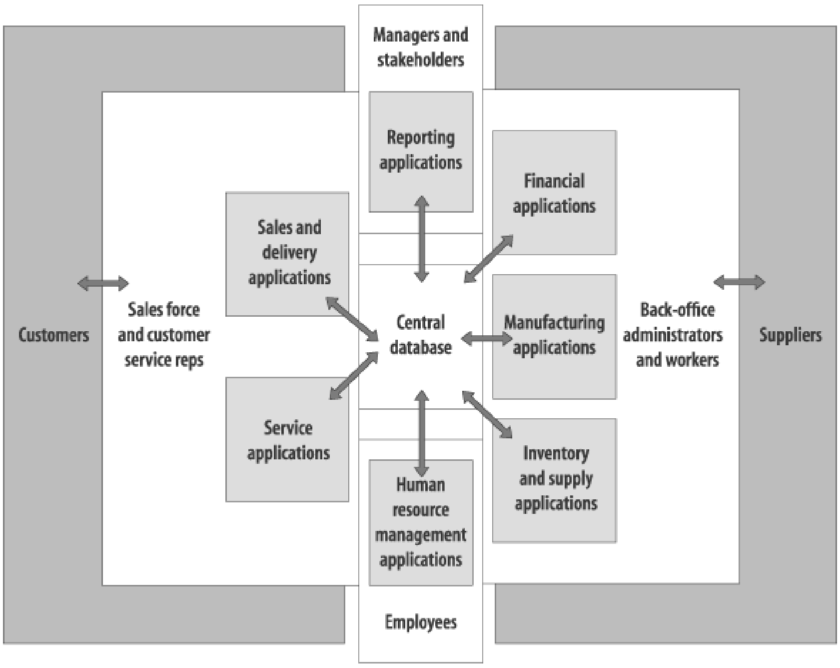

Figure 8. Basic elements of ERP (Davenport 1998, 124).

ERP system is complex structure and therefore control of rights plays very important role in this. Naturally different employees and stakeholders can use those parts of the ERP, which are critical in terms of doing their work.

According to Haddara and Moen (2017) ERP system makes possible for organizations to reduce costs, share data and information, and enhance management business processes. This could be done seamlessly by integrating and coordinating processes and functions. (Haddara 2017, 860.)

2.3 Customer Relationship Management

To fully understand the basics of customer relationship management, customer relationship marketing must be reviewed in early stages of this chapter.

Customer relationship marketing mean entity that a allows a company to create, maintain and constantly developing its customer relationships. The starting point for customer relationship marketing is to create value for customers and to ensure customer profitability and mutual satisfaction. (Bergström 2009, 460.) In figure 9 points out the implementation of customer relationship marketing.

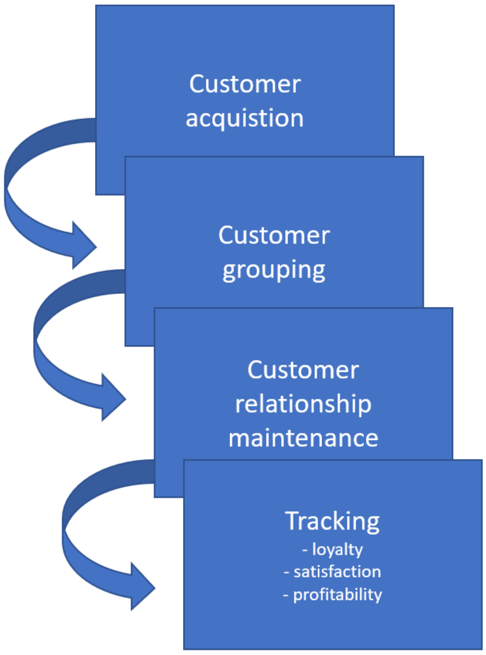

Figure 9. Implentation of customer relationship marketing (Bergström & Leppänen 2009, 317)

According to Lampikoski, Suvanto and Vahvaselkä customer relationship marketing also includes acquisition of new customer and maintaining long-term and profitable customer relationships. Customer relationship marketing is based on knowing the needs of individual and to listening to values and preferences that same individual. (Lampikoski, Suvanto & Vahvaselkä, 279.)

According to Ryals and Know (2001, 534), customer relationship management has roots in relationship marketing.

In 1970 early CRM-systems were old fashioned customer register which were operated manually. In end of 1980’s banks and insurance companies started to see this information as a source of marketing information and so customer information gathering started in different part of organization. (Buttle 2009, 365-366.) Companies faced enormous challenges when trying to organize gathered data.

First CRM-systems were introduced in the early of 1990’s when vendors started to introduce software solutions to better manage of customer data. At the early path of CRM it was very heavenly firm-orientated construct. Main idea was to acquire new customers, retain their current position and enhance new customer relationships and it was mainly harnessed for companies own purposes, such as cross-selling, segmentation or customised communication. (Saarijärvi 2013, 2-5.)

In today’s business life use of CRM is not an option, but it’s necessary and integral part of any modern business that seeks to maximize revenue and continue growing as business (Lee, Tang, and Sugumaran 2014, 3). Nowadays companies can utilize different kind of software applications from basic e-mails to more complex CRM and enterprise system applications in order to help companies to do business more effectively (Adebanjo 2003, 571). According to Lee, Tang and Sugumaran (2014, 4), by integrating all the sales, employee data, current customer, associated company, CRM systems enable companies to seamlessly take sales, customer service and marketing as a single package.

According to Oksanen (2010, 22-23), customer relationship management includes these basics: policies and systems, planned processes for meeting customers, approaching methods and means, information systems for planning and scheduling and for leading marketing, sales and customer service activities, and business strategy to maximize profitability, return and customer satisfaction.

According to Kotler (2013, 507), CRM is connecting directly with carefully selected target segments of individual consumers, frequently on one-to-one, interactive basis. Kotlers identify specially CRM to be "process of identifying, maintaining, enhancing and when necessary, terminating relationships with customers and other stakeholders, at a profit, so that the objectives of all parties are met" (ibid, 507). CRM's main goal is to gain competitive advantage over competitors by offering customer minimizing purchasing risk, a feeling of control, a sense of trust and reduced costs in exchange of being of customer (Grönroos 2004, 99).

According to Chan (2015, 37) the secret to customer relationship management is "to know who our customers are and what it is that they need from us". This also unite soul of the CRM: to know our customer and their needs. To knowing customers and their needs data company must keep the customer data timely (Lee 2014, 3). Khodakarami (2014, 29) points out four main processes which CRM involves: acquiring customers, knowing them well, providing services and anticipating their needs.

Figure 10 illustrates how different technology implementation and processes can be tied together and how it can be coordinated through different companies' model. It's collaboration of three CRM which include external information, internal information and conceptual information. This means that everyone should have access to CRM, because change of order may trigger different processes in supply chain. (Chan, 2005, 35.)

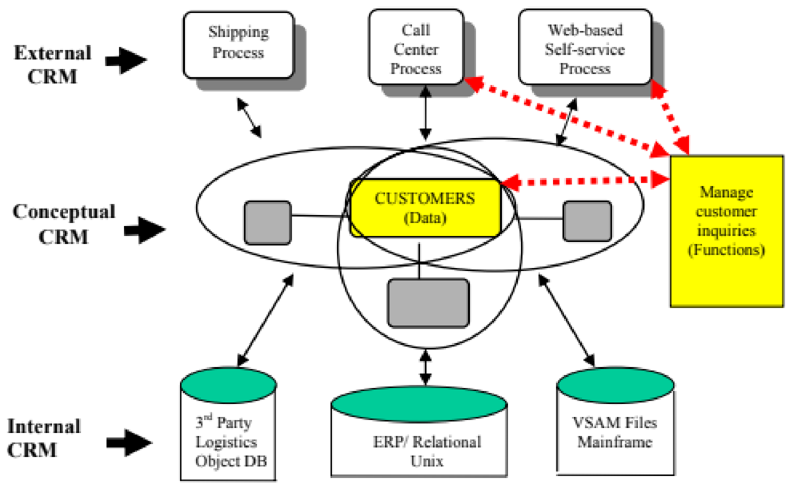

Figure 10. Integrated CRM Framework (Chan 2015, 36)

Chan also refers Porter five overlapping stages in evolution of technologies in business: “Automation of discrete transactions, functional enhancement of activities, cross-activity integration, integration of the entire value chain, and the optimization of various activities in the value chain in real time.” To gain maximize value to CRM strategy which isn’t only relying on automation, functional enhancements and some cross-activity integration. CRM must go beyond these changes to integration and real time optimization to gain value to CRM and it spans across value chains between the customer and the company. (ibid 37.)

According to Rygielski (2002) CRM includes two main stages. First one is to master the basics of building customer focus. In other words, moving from a production orientation to customer orientation. This also mean to define market strategy from outside-in and not inside-out. Focus should be on customer needs rather than product features. Second step is to move beyond the basics: companies continue to push development of customer orientation by integrating CRM across entire customer experience chain by using technology to achieve real-time customer management and constantly innovating new value propositions to the customer. (Rygielski 2002, 492.)

Buttle (2009) states that CRM as a concept includes five major issues:

1) It’s concept of operating methods and information systems, how organization systematically manages their customers.

2) It’s process, which control all customer encounters (e.g sales, marketing, customer service)

3) It’s an approach to identifying, acquiring and retaining customers

4) It’s business information system that is used to plan, schedule and manage sales, marketing, customer service activities

5) A business strategy that maximizes customer profitability, revenue and satisfaction. (Buttle 2009, 3-4.)

Amit and Zott (2001, 496-497) refers Porter’s definition of this term “value” as the number of buyers that are willing to pay for what can provide to them. This can be measured by the total revenue. Porter also noted that sources of value creation are, hence, policy choices, linkages, timing, location, sharing of activities among business units, learning, integration, scale and institutional factors. Amit and Zott points out that, information technology supports differentiation strategies and, in that way, creates value. They also referred to Schumpeter who stated that innovation is the source of value creation (Amit & Zott 2001, 496-497)

According to Prahalad and Ramaswamy (2004), meaning of value and value creation process are shifting rapidly from firm and product-centric view to more personalized consumer experience. The interaction between the consumer and the company is becoming the place of value creation and value extractions. Traditional process of value creation is mainly company centric. In company centric view of value creation, managers are providing products and services to single customer with low price. This leads to process of mass customization. (Prahalad & Ramaswamy 2004, 5-10.)

As noted by Wikstrom (1996) and Normann and Ramirez (1994) the interaction between the customers and companies is not seen as source of value creation.

CRM at itself has not universal been defined, but they are highly integrated in value creation strategy. (Saarijärvi 2013, 1; Chan 2005, 38.)

As conclusion: CRM itself is a business perspective which is based on value creation strategy. Idea of CRM is to integrate company's operating model to converts customers data into value proposition and to give competitive advantage on the market. Everyone in the company should have access to CRM system, even though access can be limited through different modules and departments.
Today public and private initiatives have changed "norm" by shifting attention from using data firm purposes to sharing data with customers. This development has driven CRM framework to a new era (Saarijärvi 2013, 5). This is where customers have access to company's CRM. CRM -system can be considered as logical continuum of ERP, because of their similarities. Both applies to entire organization and require process and application development. (Storbacka, Sivula & Kaario 2000, 140.)

According to Chen (2003) ERP is base for CRM. ERP has strong foundation and has tightly integrated back office features and in CRM these back-office features are aimed to connect to front-office features. These features are mainly used to maintain and develop customer relationships. (Chen 2003, 679.)

In next author reviews the background of **CRM software, selection process and implementation.**

According Mazurencu, Mihaescu and Nicolescu-Aron (2007, 110) stated there are lot of benefits that CRM software can bring to the company, such as transforming basic data and turn it in to useful metrics in order for them to analyse their customer more thoroughly and try to understand their life time value. This also enables sales team to next state of efficacy by increasing their return on time invested in sales activities as they can identify high profit, high revenue, and high potential customers from customer data base. Today modern CRM applications have social networking functions. (Raman, Wittmann & Rauseo 2006, 40.)

Raman, Wittmann & Rauseo (2006) also referred that CRM application can be categorized into operational and analytical. Operational CRM involves automation of marketing, sales and customer support with view to making functions effective and efficient. This aims to reduce operating cost while enabling these functional areas to render higher level of value to the customers. Analytical CRM refers to technologies which aggregate customer information and provide analysis of data to improve actions and decisions. Ideally this gives information from company's data warehouse and should be accessible form all relevant departments. (40.)

Adebanjo (2008) points out four possible benefits of using CRM-software. First is the improvement in the process that gather and use information from customers. Second are lowered costs through more efficient usage of resources which include human recourses as well. At third is improvement customer perception of the business leading. This is the result of better interfaces, speedy service as well as improved traceability. At fourth benefit has remarkable potential for increased sales as the response time to customer is faster, the allocation of resources at customer retention and recruitment is improved and product and customer information is more mobile. (459.)

According to Sajan (2017) there are three majors cause of failure when selecting CRM: first stated reason is that most companies bought CRM or nowadays e-CRM from vendors without having enough resources and expertise necessary to understand how it would affect to company's organization. Second statement implies that vendors make the selection of an appropriate application a difficult task and third statement were that most of CRM systems are implemented hastily and without proper planning. (397.)

Earley (2002) recommend that company should consider building a simple matrix to determinate the best CRM for their business. This could be done selecting functions and features such as supported platforms, pricing and integration. Then given score to each of the attributes to represent the importance to the company. By doing this company can compare the CRM software vendors and make the selection with highest score. (27-28.)

Adebajo (2008, 458), states that one of the key factors of success CRM implementing is in selection of the right software and there is no single right software for all companies. Adebanjo (2008) also introduced lists of things to consider before implementing CRM software:

1) Determinate the functional requirements of the software
2) Involve the potential users of the system throughout the specification, development and deployment phases.
3) Anticipate the future needs or possible changes in the processes of the company and make sure to involve them in the system design
4) Decide if there is need for high-level IT skill in-house. This is especially important should there be future modifications to the system.
5) Make sure the system is compatible with the required legacy IT applications. (459.)

2.4 Theoretical Framework

This study's theoretical framework is based on Lee's (2014, 4) model: the hierarchical structure for open source CRM software selection and Mesvac's needs to find out which CRM applications alternatives encounters current needs of the company. In Figure 11 modified framework is presented as it has been used in this case study.

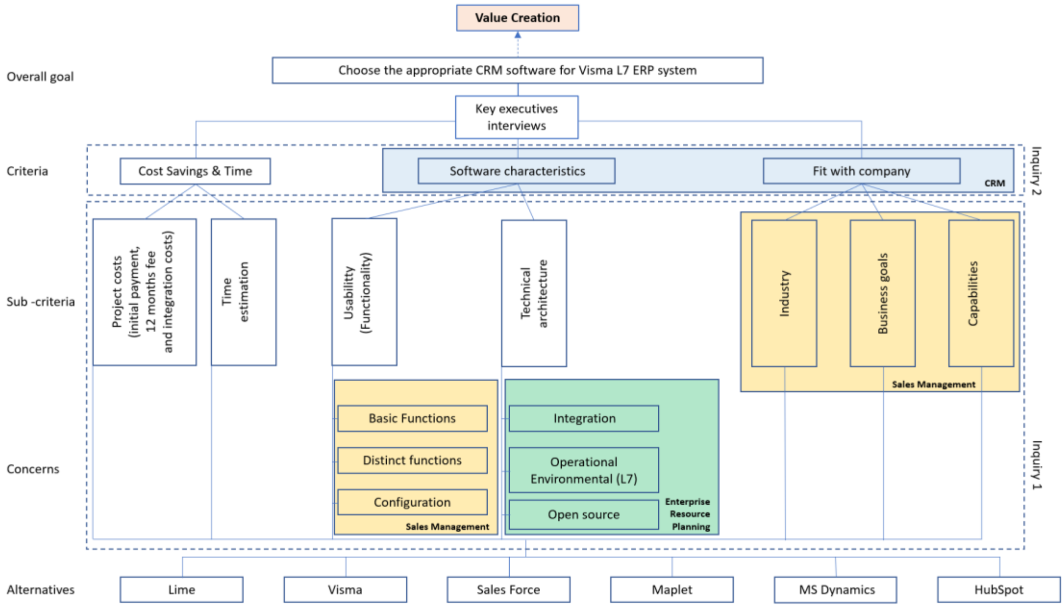

Figure 11. Modified CRM software selection

Modified CRM software selection framework has connected to main research problem/question and in the end of this is result points out the most suitable CRM -software for Mesvac Oy. CRM selection itself includes main concepts that are pointed in Chapter 2. CRM-software is connected to EPR systems and its capabilities and limitations, CRM as itself and to sales and sales management which are the end users of this selection and possible value creators for customer.

Theoretical framework includes all elements of literature review and are presented in Figure 11.

3 Methodology

Author chose to use in this research both qualitive research method to analyse current state of CRM in Mesvac Oy and quantitative research method for data collection from key executives and CRM software providers.

As mentioned in chapter 1, the purpose of this study was to examine which CRM system is chosen by key executives and to find how CRM can be implemented in Visma's L7 ERP system. These answers include the functional and economic benefits to the companies which are using Visma L7 ERP system.

3.1 Research Approach and Action research

The purpose of this research was to investigate which CRM-software could improve current situation, what challenges there are and start to implement it to company after analysing results and data. Another aim was to get good understanding of the current CRM process in Mesvac Oy and to find its capabilities and challenges in current operational environment. Action research was selected as method, because it was expected to give needed practical results and new data and understanding of current CRM in the company.

In order to bring new aspect of author used quantitative method to approach in this research. Besides collecting data from quantitative methods, author analysed and used other sources such as documents, interviews of key executives and notes taken by author which we're approached in qualitative methods. This qualitative method is used to enrich collected data.

In order to answer the main research question author used questionnaire to collect data from CRM vendors. Questionnaire's structure was created by using theoretical framework as a guideline. To collect weight points from Mesvac, author set questionnaire 2 to collect points of importance from the key executives for each question presented on questionnaire 1. Key executives also had to evaluate importance between costs and time versus software characteristics and fit to the company. After collecting quantitative data from vendors and key executives, author measured answers to key executives' interviews to find possible conflicts.

In order to find answers to sub questions, author mainly used interviews as main resource of data.

Action research was used in this study as method. According to Reason and Bradbury (2001) a primary purpose of action research is to produce practical knowledge that is useful to people in their daily lives. Action research is about working towards practical outcomes, and about creating new forms of understanding, since action without understanding is blind, just as a theory without action is meaningless. Action research aims to be a systematic process. (1-4.)

According to McNiff and Whitehead (2011), action in action research action means taking action to improve a current practice and research means finding things out and coming to a new understanding, that is, creating new knowledge in certain topic. In action research the knowledge is about why and how an improvement has happened. Moreover, action research is the form of enquiry that enables practitioners in every job to evaluate and investigate their work. The action part of action research is about improving a practice. The research part of action research is about offering explanations and descriptions for what you are doing as you improve a practice. (7-14.)

Figure 12 illustrates how Action research is often seen as cyclical or spiral processes where in each step lead to the next. Furthermore, final step sets the stage for an iterative repetitive process to begin again. Data are needed to answer the questions and how data will be collected. (Stahl and King 2019, 26)

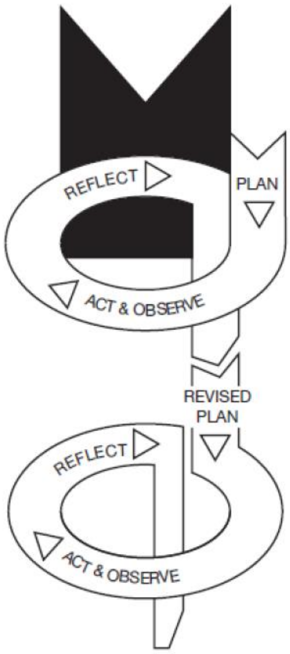

Figure 12 The Action Research Spiral (Kemmis and McTaggart 2008, 278)

According to Rigo, Perdon, Caldeira and Araujo (2016) pointed out two-cycled research process based on action research and it was used in CRM selection process in their research. First cycle of action research focused on selection process which included five systematic phases; Diagnosing, action planning, action taking, evaluating and specific learning which figure 13 illustrates. (50.)

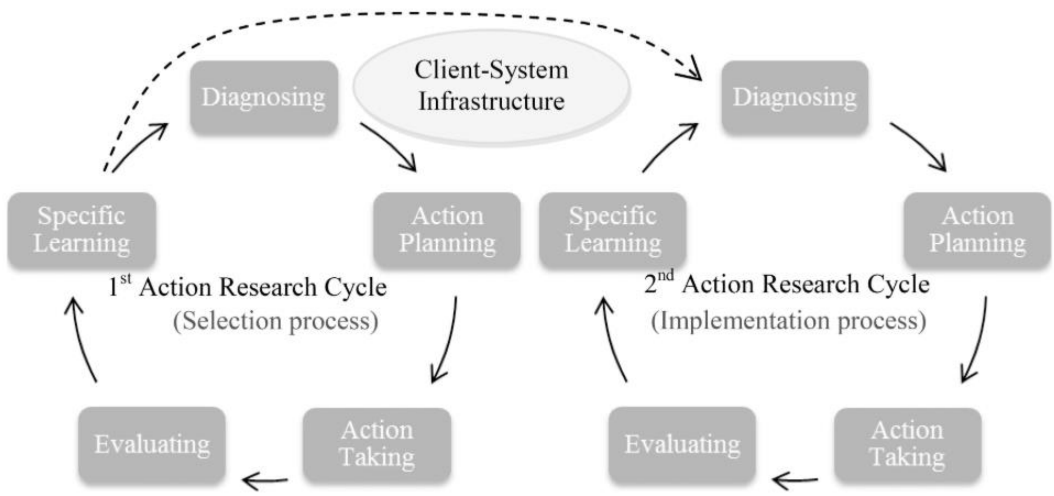

Figure 13. Two-Cycle research process (Rigo, Pedron, Caldeira Araujo 2016, 51)

Author’s main idea was to have implementation in this process, but current situation at Mesvac Oy postponed implementation process to the future. Author has provided information package to selected test group. (Appendix 3.) After implementation to testing group, test group will be testing and evaluating its possibilities and flaws to author, which lead to specific learning and corrections before final implementation of CRM.

3.2 Research Strategy

Strategy signifies, what is wanted to do. Research strategy was to find answer to the following research questions as mentioned in chapter 1.3.

Research questions are as follows:

- Which CRM system is most suitable for at current needs of Mesvac Oy?
- How can CRM be integrated to Visma L7 ERP system
- What are the benefits of CRM in sales and in sales management in Mesvac Oy?

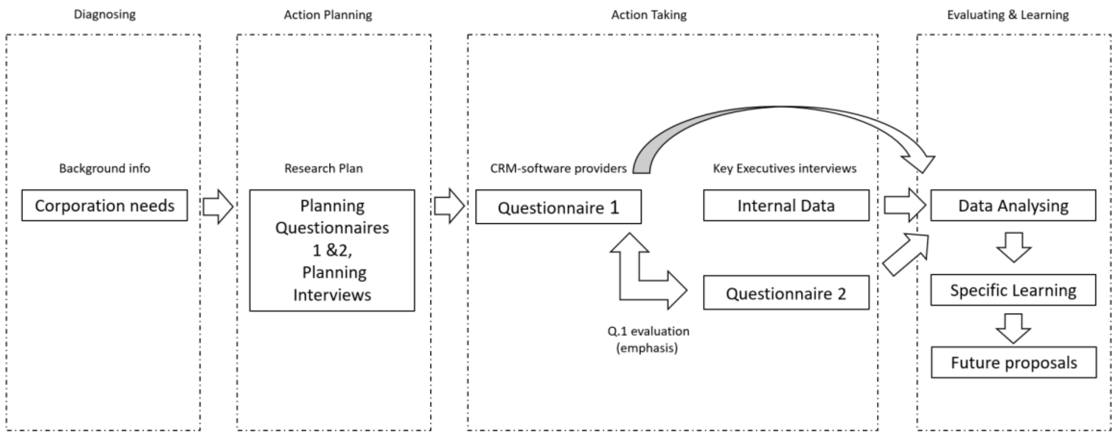

Figure 14. Research Plan (CRM-software selection process)

3.3 Data Collection

Gathering data is main purpose to generate evidence (McNiff 2011, 147). In this research main data collection. Depending on the context data can be collected in different way. In action researcher often gather data by active involvement in the daily process of the organization (Coughlan & Coghlan 2002, 231).

All type of data gathering methods is available in an action research. It's possible to use methods from traditional research for data gathering and qualitative and quantitative tools like surveys and interviews. These kinds of data collection tools also can generate suspicion, hostility, anxiety, and apathy or create expectations between members of the organisation. This could be critical to the success of project if this these if these lead to missed data. (ibid, 225.)

3.3.1 Questionnaire 1

This research started by in gathering background data from different sectors of Mesvac Oy. One of the most important questions for questionnaire came from IT-department which is one of key factors in implementations. Author also referred another department's which gave the framework for questionnaire 1.

In Questionnaire 1 author used theoretical framework as presented in figure 11. Questionnaire was divided in two main sectors. In first part (questions: 1-18) was concentrating on software characteristics and fit with a company as presented on figure 11. Second sector (questions: 19-24) was mainly concentrating costs and time savings.

Author sent questionnaire 1 (appendix 2) to all selected vendors in 28.6.2019. Author chose six (6) vendors which has reliability and status of good CRM vendor. Vendors that were chosen were; Lime Technologies, HubSpot, SalesForce, Visma, Maplet and Microsoft Dynamics.

All questions in Questionnaire 1 were made in Finnish language, since all the vendors were Finnish speaking people.

Questionnaire was sent on 28th of June 2019 to all vendor candidates by email.

All vendors responded to Questionnaire 1. Which is excellent response rate 100%, comparing to the mean of e-mail surveys which is 31% and internet surveys generally 25%. (Deutskens, 2004, 32)

- 28th of May 2019,
- 1st of July 2019
- 3rd of July 2019
- 26th of July 2019
- 5th of September 2019
- 10th of September 2019,

All the first sectors questions were designed to be simple and accurate. Vendors must only answer to these questions using yes or no principle.

In the beginning of sector 2 author integrated description of L7 integration. After description vendors were asked to give time and cost estimations. Mesvac Oy also had interested on new configurations system and ability to implement service functions into the change which were added on the sector 2.

As told on chapter 3.3.1 sector 2 was concentrating costs and timesaving's. Main six questions were separated to better understanding of total costs and time.
These six questions included (appendix 2):

- Project start-up fee
- Product user fee's / month
- Price estimation for integration process
- Overall time schedule (including integration, user training, implementation)
- Configuration price
- Other cost (service functions etc)

3.3.2 Questions and interviews

The background data from this case study was gathered by interviewing company's keys executives. According to Eisenhardt and Graebner (2007, 28), interviews enable efficient collection of fruitful empirical data.

Interviews was chosen to gain practical view and understanding at challenges of the current situations that the case company has faced in field of CRM and what are their limitations, risks and opinions on the future.

Interviews was held on:

- 1st interview: 5.2.2020 at 1.04 pm.

- 2nd interview: 10.2.2020 at 2.11 pm.
- 3rd interview: 19.2.2020 at 2.09 pm.
- 4th interview: 25.2.2020 at 8.33 pm.

The questions were sent to the interviewees in advance to give them a chance to familiarize themes and topics of the discussion beforehand. Interviews was held in face to face meetings. Interview structure was hold as semi-structured interview, which allowed to go through pre-planned questions and make specifying questions on the way. Interviews lasted from 40 minutes to 1h 20min.

The interview was recorded with the permission of the interviewee. The voice recorder of Samsung Galaxy smart phone was used to record the interview conversation, and transcript of the conversation was written by replaying the recorded file. Total length of transcript is 12 pages, which was written in Calibri font, font size 14 with space 1,15. This eliminated danger of subconsciously relying on the interviewers' own, possible biased notes or preconceptions.

All questions and interviews were made in Finnish language, since all the key executives were Finnish speaking people. Main reason for this was to eliminate possible misunderstandings. Questions can be found in Appendix 1. Questions were divided in four main categories: ERP, current state of CRM system, need for CRM system and value creation.

3.3.3 Questionnaire 2

Questionnaire 2 was held in the end of interview session for the key executives. Key executives were given Questionnaire 1 and asked to evaluate first 18 questions (1st sector of the questionnaire 1) from 0 to 2. 0 means not important, 1 means semi important and 2 means important.

As mentioned in chapter 3.3.1 Questionnaire 1 was divided two main sectors. Key executives also asked to evaluate these sectors at by adding weighted points for each sector. Only the maximum value 100 was given to guide key executives. (e.g. 1st sector 50 points and 2nd sector 50 points).

Data from Questionnaire 2 were in main part of research. This data gives internal valuation and weight for the data analysing which were given from Questionnaire 1.

3.4 Data Analysis

Data analysis of this research is based on the analytic hierarchy process (AHP). AHP is designed to solve complex multi-criteria decision's problems. It is also flexible and powerful tool for handling both qualitative and quantitative multi-criteria problems. This process is aimed at integrating difference measures into single overall score by ranking decision alternatives and it is not static framework, but more over dynamic in its functions and features. (Lee 2014, 2-3.)

This research was implemented multi-method quantitative study, collecting data by utilizing multiple data collection methods: interviews and questionnaires which included both quantitative and qualitative methods. This approaching method is also called as triangulation and it was in order to increase the reliability of the findings.

Author modified structure provides also internal information from inquiry 2 (Figure 11), which give internal sight of the needs and focus points from Mesvac perspective. Final selection is made through this matrix and combining it to internal background data from key executives. In addition to evaluating the interview as data collection method and how it effects on the reliability and validity of the findings obtained.

3.5 Reliability and Validity

According to Datt (2016) the quantitative research covers mainly empirical perceptions' conclusions. Validity defines in this kind of approach, did the research measure what it supposes to measure. Datt also points out that validity's also measures accuracy of research result (Datt 2016). According to Ward the correctness of measurement must be measured. If the measure is not reliable then it is not valid (Ward 2019). According to Kananen (2009) the main aim of qualitative research is to describe phenomenon, comprehend it and present a meaningful interpretation. The main idea is to get deeper understanding of the phenomenon and put it under magnifying glass as well as profound and rich portrayal and interpretation of the phenomenon. The aim is to absorb as much as possible from perception of the phenomenon which will give in-depth to this study. (18-19.)

Qualitative research has numerous debates of its reliability and validity. According to Golafishani (2003, 597), qualitative research uses a naturalistic approach that seeks to understand the phenomena in context-specific settings. Patton states (2002), it is real world setting, where researcher does not attempt to manipulate the phenomenon of interest. While the credibility in quantitative research depend on instrument construction, it basically means that the researcher is the instrument in qualitative research. (14, 39.)

Stenbacka (2001, 551), points out that concept of reliability is misleading in qualitative research. According Golafshani (2003, 601), validity and reliability are two different factors, which any qualitative researcher should be concerned while designing, analysing results and judging quality of the research.

According to Carvalho and White (1996, 21), in order to identify issues or to obtain information on variables not obtained by quantitative surveys. This is called enriching and it has been used in this research to obtain more information to achieve more data into results.

According to Coughlan and Couglan (2002) An action researcher must maintain validity by using and accepting action research cycles, testing the assumptions and exposing them to public testing. An action research result is a story which the researcher is telling. An action researcher must avoid biases version of the story, but it must take into consideration the scale on which story is valid presentation of things that has taken place and how the story is understood. (237.) These “four parts of speech” as to help action researcher’s role: Framing, Advocating, Illustrating and Inquiring (ibid, 238).

Framing occurs when action researcher is disclosing the dilemma which must be solved, stating the purpose of speaking for the present incident, and sharing assumptions about current situation. Advocating takes place when researcher is disclosing the goal to accomplished, asserting the option, perception, and proposal for action. Illustration role comes when the action researcher is exposing bit of solid story making the advocacy concrete and orienting the other more distinctly. Inquiring occurs then an action researcher is getting to know the views of the participants and perspectives by questioning them.

According to Kananen (2009) action research can consist of several analysing and data gathering methods of the qualitative research. Action research doesn’t have own methods for data gathering or data analysis. Action research also in addition comprises some of quantitative research methods. (20.)

4 Results

The result of this research will be presented in this chapter.

As presented in Chapter 3.3 the quantitative data was collected through questionnaires and interviews. These results will be review more closely. And finally, data analysing where data are sorted, and it will be presented in summary of results chapter.

4.1 Results of quantitative researches

Answers were exported to Excel for numeric modification, cross-checking, calculation and closer analysing. All of vendors answers (from 1-24) were given attribute from 1 to 2. 1 equals no-answer and number 2 was equal to yes answer. Question number 16 were only exception there for numbers were reversed. Reason for this was to Mesvac’s desire to have only one partner in this kind of project.

In the figure 15 shows vendors answers on first sector on questionnaire 1.

	CRM Kysely	Lime	Visma	SalesF	Maplet	Dyncami	Hub
		A	B	C	D	E	F
1	Onko tuotteessanne avointa rajapintaa?	2	2	2	2	2	2
2	Oletteko aiemmin tehneet integraatioita Visman L7 ohjelmiston kanssa?	2	2	2	1	1	1
3	Onko tuotteestanne "on-site" ratkaisu?	2	2	1	1	2	1
4	Onko tuotteesta mahdollisuutta jatkuvasti päivittyvään kaksisuuntaiseen tiedon siirtoon?	1	2	2	2	2	2
5	Voiko tuotteessanne antaa erilaisia tehtävän antoja sisäisesti?	2	2	2	2	2	2
6	Onko tuotteesta mobiiliversio?	2	2	2	2	2	2
7	Onko tuotteessa haku ominaisuus asiakassegmenteittäin?	2	2	2	2	2	2
8	Onko järjestelmässä mahdollista tehdä eri tasoisia merkintöjä?	2	2	2	2	2	2
8a	Asiakastaso	2	2	2	2	2	2
8b	Kohdetaso	2	2	2	2	2	2
8c	Sopimustaso	2	2	2	2	2	2
8d	Laitetaso	2	2	2	2	2	2
9	Tarjous ja tilaus-kannan raportoinnin mahdollisuus?	2	2	2	2	2	2
10	Onko tuotteessa sisälle rakennattavissa oma laskentakonfiguraattori?	2	2	2	2	2	2
11	Onko tapaamisia mahdollistaa Outlook-ohjelmaan?	2	1	2	2	2	2
12	Onko tuotteella karttaominaisuus reitin suunnitteluun?	2	2	2	2	2	1
13	Onko tuotteella dashboard ominaisuutta, jota voi muunnella tarvittaessa?	2	2	2	2	2	2
14	Onko tarjouksien seuranalla automaattista muistutus ominaisuutta?	2	2	2	2	2	2
15	Onko tuotteessa helposti seurattavat aktiivisuuden mittarit?	1	2	2	2	2	2
16	Käytättekö integraatiossa yhteistyökumppaneita?	1	1	2	2	2	2
17	Onko konfiguraatiossa mahdollista käyttää L7 tietokantaa?	2	2	2	1	2	2
18	Onko ohjelmassa mahdollista sisällyttää huollon toimintoja?	2	2	2	2	2	2

Figure 15. Vendors answers in sector 1

In sector 2 author must eliminate two questions for lack of data. Questions 23 and 24 which included price of configuration and service functions. The main data was gathered from questions 19-22.

Query shows the number of 15 evaluated users and it included project start-up fee, user fee/ month, price estimation of integration and schedule. In figure 16 shows the results of sector 2 of questionnaire.

19	Projektin käynnistysmaksu	1120	3390	0	38000	25000	8500
20	Tuotteen käyttäjämaksut/kk (15 kpl)	950	585	2250	735	50	1108
21	Integraation toteutuksen hinta-arvio? (oma tai alihankkijan arvio)	6720	10170	**0**	0	22500	8250
22	Toteutuksen kokonaisaikataulu arvio?	5	3	2	6	3	2
	CRM (aloitusmaksu, 12kk kättäjämaksut, integraatio)	**19240**	**20580**	**27000**	**46820**	**48100**	**30046**

Figure 16. Vendors answers in sector 2

In the last line is total sum of the cost which include start-up fees, 12 months of user fees and cost of integration in total (figure 16).

In order to get valuation points for each sector and for each question author used questionnaire two (2) on key executives. In questionnaire two (2) key executives valuated sector one (1) questions (1-18) from 0 to 2 weight points and evaluated total importance with sector one (1) and two (2) (Table 1). In sector two (2) evaluation between cost and time was evaluated 50/50. (Table 2)

Table 1. Weighted points (Sector 1 vs Sector 2)

	Sector 1 (1-18)	Sector 2 (19-22)	
	Weighted value	Weighted value	Total
Total	xx	yy	100

Table 2. Weighted point in Sector 2

	Costs	Time	Total
Sector 2	50%	50%	100%
19-22 pages			

Results and weighted values of each question from key executives is presented in Table 3. Weighted value is mean. Mean has been calculated using formula: average = sum of given weight points (a+b+c+d) / count of key executives. (4). Sum of means from table 3 is 31,75. As presented in earlier maximum points of each question in sector 1 was 2 points. 31,75 x 2 points = 63,5 points, which is maximum result from sector1.

Table 3. Results of weighted values in sector 1

	CRM Kysely	Painotuksien keskiarvot / kysymys
		0-2
1	Onko tuotteessanne avointa rajapintaa?	**1,5**
2	Oletteko aiemmin tehneet integraatioita Visman L7 ohjelmiston kanssa?	**1,5**
3	Onko tuotteestanne "on-site" ratkaisu?	**1,75**
4	Onko tuotteesta mahdollisuutta jatkuvasti päivittyvään kaksisuuntaiseen tiedon siirtoon?	**1,5**
5	Voiko tuotteessanne antaa erilaisia tehtävän antoja sisäisesti?	**1,5**
6	Onko tuotteesta mobiiliversio?	**1,5**
7	Onko tuotteessa haku ominaisuus asiakassegmenteittäin?	**1,5**
8	Onko järjestelmässä mahdollista tehdä eri tasoisia merkintöjä?	**1,5**
8a	Asiakastaso	**1,75**
8b	Kohdetaso	**1,75**
8c	Sopimustaso	**1,75**
8d	Laitetaso	**1,5**
9	Tarjous ja tilauskannan raportoinnin mahdollisuus?	**2**
10	Onko tuotteessa sisälle rakennettavissa oma laskentakonfiguraattori?	**1,5**

11	Onko tapaamisia mahdollistaa Outlook-ohjelmaan?	**1**
12	Onko tuotteella karttaominaisuus reitin suunnitteluun?	**0,25**
13	Onko tuotteella dashboard ominaisuutta, jota voi muunnella tarvittaessa?	**1**
14	Onko tarjouksien seuranalla automaattista muistutus ominaisuutta?	**2**
15	Onko tuotteessa helposti seurattavat aktiivisuuden mittarit?	**1**
16	Käytättekö integraatiossa yhteistyökumppaneita?	**1**
17	Onko konfiguraatiossa mahdollista käyttää L7 tietokantaa?	**1,5**
18	Onko ohjelmassa mahdollista sisällyttää huollon toimintoja?	**1,5**

Weighted values between sector 1 and sector 2 is calculated by separately. Sum of sector 1/2 answers is divided by maximum points. As mentioned in chapter 3.3.3 maximum points per key executive is 100. Four key executives' maximum can be calculated as 400. Calculation for weighted points is showed in table 4.

Table 4. Weighted values of Sectors

	A	B	C	D	Sum	Weighted value
Sector 1	40	80	40	50	210	**52,5 %**
Sector 2	60	20	60	50	190	**47,5 %**

According on results maximum points of each sector can be calculated. Maximum points from sector 1 is **52,5** and sector 2 47,5. As mentioned above sector 2 has been divided 50/50 in cost and time: maximum point is 47,5/2 = **23,75**, which is same maximum in time.

These results offer background for this evaluations process (table 5)

Table 5. Calculated weight points by sectors

	Sector 1	Sector 2		Total
		Cost	Time	
Max points	52,5	23,75	23,75	100

At this point vendors points from figure 15 is added weighted values by multiplying answers by weighted values from sector 1 (table 3). Vendors answers including weighted points is shown in table 6.

Table 6. Vendors answers including weighting value

Lime A	Visma B	SalesF C	Maplet D	Dyncamics E	Hub F
3	3	3	3	3	3
3	3	3	1,5	1,5	1,5
3,5	3,5	1,75	1,75	3,5	1,75
1,5	3	3	3	3	3
3	3	3	3	3	3
3	3	3	3	3	3
3	3	3	3	3	3
3	3	3	3	3	3
3,5	3,5	3,5	3,5	3,5	3,5
3,5	3,5	3,5	3,5	3,5	3,5
3,5	3,5	3,5	3,5	3,5	3,5
3	3	3	3	3	3
4	4	4	4	4	4
3	3	3	3	3	3
2	1	2	2	2	2
0,5	0,5	0,5	0,5	0,5	0,25
2	2	2	2	2	2
4	4	4	4	4	4
1	2	2	2	2	2
2	**2**	**1**	**1**	**1**	**1**
3	3	3	1,5	3	3
3	3	3	3	3	3
61	**62,5**	**60,75**	**57,75**	**61**	**59**

As mentioned earlier sector 1 maximum points is given table 52,5. By using ratio formula each vendor gets their own ration number. Ratio is calculated by dividing vendors weighted points (table 6) with weighted maximum 63,5 points which has been calculated above. Ratios and total points for each vendor is presented in table 7.

Table 7. Ratios and total points from sector 1

	Lime	Visma	SalesF	Maplet	Dynamics	HubSpot
ratio	0,9606	0,9843	0,9567	0,9094	0,9606	0,9291
points	**50,43**	**51,67**	**50,23**	**47,75**	**50,43**	**48,78**

As for sector 2 calculations is based on pricing formula where cheapest offer gets full points and others in relation to the cheapest price. This is then multiplied with weight value. Vendor points of sector 2 are presented in table 8 and 9.

Y= cheapest price / vendors offer * weight value (23,75)

Table 8. Vendors points in costs

	Lime	Visma	SalesF	Maplet	Dynamics	Hub
points	**23,75**	**22,20**	**16,92**	**9,76**	**9,50**	**15,21**

Using same method time is calculate in this research.

Y= small time evaluation / vendors time evaluation * weight value (23,75)

Table 9 Vendors points in time estimation

	Lime	Visma	SalesF	Maplet	Dynamics	Hub
points	**9,50**	**15,83**	**23,75**	**7,92**	**15,83**	**23,75**

4.2 Results of qualitative research

By interviewing four key executives author gathered information about four main topics which were related to CRM integration: ERP, current state of CRM system, need for CRM system and value creation. (Silvan, Kuusrainen, Meriluoto, Lindholm 2020)

4.2.1 ERP

Major finding according to current ERP system were felt as little bit old fashioned, but still functional system. Mainly because it also includes service and production functions and provides information sales and service information.

Key executives found that best benefits of current ERP system are that it currently works fine as customer data resource which can be used in sales and service and it provides necessary function for production and sales. It also has included financial management which are normally has their own function.

Even though it has basic functions in sales, it isn’t sales orientated system. Data can’t be sorted from ERP and reports are driven from IBM Cognos Analytics system.

Key executives also pointed out that current system is “slow” and “stiff” and crashes on time to time. Those issues are mainly related to large amount of history. Inputting data is as heavy operation and taking reports from system takes time. Key executives see this mainly not efficient tool.

In order to changing ERP to new one, key executives see this process as huge cost and recourse investment.

“The day will come when SAP ERP-system will come here, because we belong to the Hörmann Group which is already using SAP-system”

Change for to new ERP system will happen in near future.

Mesvac major challenge tailored working environment and fragmented information which nearly impossible to transfer to a new environment. It will also be challenge for sales in non-Hörmann products and service functions as SAP doesn’t have tools for this.

Key executives pointed out that one of the major challenges is internal change resistance to research new possibilities.

4.2.2 Current state of CRM at Mesvac

At currently there isn’t one CRM system which would allow to do all the functions in one place. Different department are using different tools such as excels, reports from IBM Cognos and from own created Meso-system.

Sales management in Mesvac is based on Cognos reports which gives different information about sales. Followed attributes are offers, orders and Hit Rates. In service sales these attributes are not available, because of the shattered information in different systems. Bonus systems are mainly based on to Cognos reporting system.

Currently reports are used systemically to lead and guide sales. Report are divided into weekly reports, monthly reports and personal reports. In product group reports allows to look at product expertise and need of induction. In service sales leading and guiding is mainly done through excels and mobile phone.

Currently CRM doesn't provide any information about contacts or meeting.

"It stays in notes of regional sales manager"

Key executives noticed that it would be good if system supported salesman own activities and after that it could be used in different organisations and in sales management.

Lack of activity functions are compensated by sending emails. Such things as leads are not recorded and so they cannot be followed. Current CRM/ LTR doesn't have the transparency and cross information with service. In the future service function will be implemented to LTR. Current configurator allows mistakes and it needs lot of know-how from sales department. It also doesn't provide finished material for ordering department. Current LTR also lockdown after order and modifications are made in ordering department. This can leave to wrong information to system which can be copied forward.

According to key executive's current sales configurator won't get faster even though current system is changed. However current configurator should be able to make more efficient by reprogramming and optimizing calculations rules and calculator program. Main reason for this slow motion is coming from when configurator is asking lot of questions from huge amount of information through different calculation adjustments.

Changing configurator could give some relief for this. Challenges are programming all from start, transition period, initiations. Key executives also see possibilities such as better support from the vendor, formulas could be remade and check from start and for possibility of an error could be reduces and free up resources to other usage.

Currently Key Account is managed by Key Account Manager. Knowhow such as operating modes and list of executives currently silent information and isn’t in the system. Currently there aren’t right place in common databases.

4.2.3 Need assessment of CRM at Mesvac

According to key executives working CRM could provide lots of benefits to the organization. Main benefits which key executives was faster and more informative data for all over the organization. Another was recording meetings/site visits and sharing information, follow-up functions and transparency. These functions would speed up processes and give more efficacy to sales organization and support functions. Benefits of CRM system can be implemented (e.g. to sales) by filling the needs and guidance of their own work. CRM will give them tool which gives guidelines.

Challenges for new CRM implementation is seen in training, learning new ways. Major challenge is in integration to current ERP system. According to key executives it has been studied by Mesvac organization and as a result: it it’s almost impossible or highly expensive project. New CRM vendor should have knowledge from Visma L7 ERP and expertise in webservice interface. Webservice in interface is very limited and differs significantly from modern used practices. This type of integration can only be done with owner of the ERP system.

In the future customer relationships will be more complexed and system/data must be up to date. This type of concentrating need full support of every department and should be implemented though organization to get full benefit.

4.2.4 Value Creation in Mesvac

According to key executives the main goal is to give added value to the customers. In new sales that means finding optimized product in optimized price to the needs of customer. This also includes performance and durability. This is also in challenge in sales. Sales usually work with contractor company which aren’t the final users.

In service sales added value comes from pre-emptive maintenance and considering customers human flow and flow of goods.

Major finding is to that value creation is based on selling expertise through practical and device knowledge.

According to key executives’ value creation is used in almost in every department.

4.3 The summary of the results

In table 10 is comparison all the vendors with points of each sector.

Table 10. Results of vendor comparison

	Sector 1	Sector 2		Total
Vendors	Query	Costs	Schedule	Max. 100
Lime CRM	50,43	**23,75**	9,50	83,68
Visma	**51,67**	22,20	15,83	**89,71**
Sales Force	50,23	16,92*	**23,75**	90,90*
Maplet	47,75	9,76	7,92	65,42
Microsoft Dynamics	50,43	9,50	15,83	75,77
HubSpot	48,78	15,21	**23,75**	87,74

* not comparable (missing data)

Even though SalesForce got the highest points in total, it must be eliminated from the results. This is because it didn’t have any cost estimation for integration, which should be provided from their partner Variantum.

Author reflected given results to major findings from interviews. Major findings considering CRM implementation came from key executives, which pointed out that limitation of webservice interfaces. It has been studied to be almost impossible to integrate outsider CRM software to current ERP system or it would be very expensive project. According these results Visma was chose to be CRM provider for Mesvac Oy.

5 Discussion

In these research paper author explored what CRM is and what kinds of theories are linked to it and main objective was to find out which CRM is the most suitable for current needs of Mesvac Oy. Main reason for this topic came from Mesvac to develop sales processes and to gain benefits from CRM system and to understand what these benefits from it. This research also shows how CRM is linked to ERP, Sales and sales management and to value creation. Research aim is to open these to case company and to all the L7 users. In Chapter 2 these linkages have been told through in literature point of view.

The focus of this study is on the selection process, even though originally plan was to include implementation process to this thesis. This process was postponed by Mesvac Oy’s board to the future. Even though preparations such as diagnosing, and action planning has already made. Diagnosing included the needs of current LTR functions and action planning included 2 phases: testing group implementation and full implementation. Testing group has already got documentation about new features of LTR and it can be seen in Appendix 3.

According to research plan of selection process: first phase was diagnosing corporation needs by observing work environment during working hours, second phase was action planning which included questionnaire 1 and 2 planning and design the structure of interview by using both qualitative and quantitative research methods to gain data. As mentioned before this type of data gathering was aiming for triangulation which would give more reliability on findings ahead. Theoretical framework was used to as to guide questionnaire 1.

Outcomes of the research with questionnaires and the interviews were in line with each other. Two sets of questionnaires were carried out as it mentioned in chapter 3. Second questionnaire with key executives gave platform for researching results from questionnaire 1.

Interviews with the supporting literature revealed, in the case of Mesvac Oy, that there is a demand for an CRM-software and that it is relevant for successful business presently at Mesvac Oy and will possibly be even more so in the future. The system will not only increase the company’s performance but can also save money in terms of time.

5.1 Answer to the research questions

The objective of the study was to answer to these following research questions:

Main question: Which CRM system is most suitable for at current needs of Mesvac Oy?

Sub-question 1: How can CRM be integrated to Visma L7 ERP system?

Sub-question 2: What are the benefits of CRM in sales and in sales management in Mesvac Oy?

By using theoretical framework from chapter 2.4 and results from 4.3 showed Sales Force to get most points. Author must eliminate this answer because lack of data. After elimination Visma collected most of the points in this comparison. According to theoretical framework this result had to be analysed though information from interviews.

Qualitative data was divided in four main groups: ERP, Current state of CRM, New possibilities of CRM and Value Creation. These themes were mainly to keep author in current subject at all time. All collected data was transferred to excel format to perceive the whole picture. Every group was divided in their own tab which included question and four different answers.

According to key executives the major challenge for integrating new CRM to current ERP system. New vendor should have early experience from Visma L7 ERP system and have expertise in webservice interface, which is very limited on differs significantly from modern practises. This process has said to be almost impossible option, or it is highly expensive solution which should be done with owner of the ERP system. According these findings author must consider the possibility that price for integration might not include costs from owner of ERP system. This also could increase the differences that are revised on table 10. These findings support selecting Visma as a vendor.

Secondly key executives pointed out possibility for change of ERP system from Visma L7 to SAP system in near future. This also led to conclusion not to make major changes to gain short time advantage. By implementing new CRM would gain benefits after training period. According to one of the CRM vendors investing for new CRM software can produce profit after 2-3 years. In that time new CRM has paid itself back. This finding also supported selecting Visma as vendor.

After analysing both quantitative and qualitative data the answer for main research question is Visma.

Answer to 1st sub question is by through webservice interface which must be done with owner of ERP system. This type procedure is mentioned to difficult and highly costly process.

Answer to 2nd sub question:
Information gathered from Mesvac key executives stated CRM offering new ways to communicate with customer, with faster and more informative way with ability record it to database. It also combines information in one place and allows to monitoring assignments in sales managements point of view. As sales point of view it controls what is done and what needs to be done. This also would bring certainty to whole sales process.

5.2 Practical implications

These results can be exploited by selecting Visma as vendor and by implementing upgrades to current LTR which key executives descripted in earlier chapter. For unknown reason these functions can be upgraded to current LTR, but those never were upgraded. Author never find out why. Author points out that main issue is that case company fully understand the meaning of CRM as value creator and how it can be exploited in future.

5.3 Assessment of the result of in light of literature

The literature review showed the whole nature of customer relationship management and how it connects to sales management and to ERP system. Even though case company follows the path of value creation idea it still hasn't find a way to collaborate with sales process. Fully functional CRM-software can create multiple benefits to company.

Result showed that CRM isn't just a tool, but way of thinking which must be implemented to core of company. This idea needs also tools so it can be put into practice. Study also showed that CRM is most powerful when it is used through whole organization, not just one part of company. This should be considered as new way of thinking. LTR should not only consider sales function, but also implement for each department to gain full benefit. This would include service sales, maintenance and installation department. Customer data that exist in files and databases must be consolidated and shared (Chan 2005, 37).

Study also pointed out that CRM can be used also as motivational point view which would increase work efficiency. In motivation point of this can streamline sales processes and create more time for actual sales. And, to give sales management needed information and tools to action and lead teams through customer-centric sales strategy and create value to the customers through this process. CRM also provides reports from actions to sale profit.

Without CRM-software that records customer transactions there is no data that can be processed and the knowledge what they want from the company. Knowing customers and their needs company must keep the customer data timely (Lee 2014, 3). Also, without data anticipating customer needs is impossible. We're living in 2020 and according to Lee, Tang and Sugumaran (2014, 3), CRM is not an option, but it's necessary and integral part of any modern business that seeks to maximize revenue and continue growing as business

In adapting new CRM to company theoretical framework can be used as guideline through this kind of process. As said earlier by Chan and Adenbajo one of the critical success factors is to make sure that chosen software is compatible to legacy IT application. (Chan 2005, 37; Adebanjo 2008, 450.). This is also one of the key factors to prevent CRM project from failing, which happens 55% according to Gartner's research.

5.4 Limitations of the research

There is couple considerable limitation of this research. First was lack of data considering questionnaire 1 (Appendix 2) at pricing section. Price of integration and price of configurator were missing which made price comparison very difficult. In research price comparison section author eliminated price of configurator or other costs such as service factors, because lack of data. There were also CRM-software providers which used partners during implementation phase and assumed that partner will provide price information according this sector, which never came to author and there for had to be eliminated from results.

Second limitation was delay on implementation process, which ended to action planning face during research. Main reason for delay considered prioritising Visma's Service project to LTR and narrowing history data on ERP system. Those projects were already open, and board prioritized these projects to be ready before opening any new projects on the background. Action face will be postponed until these tasks are off the list. There for there is no documentation about actual results of selected CRM-software in action.

Third limitation was a reliability of qualitative research. There is a possibility that interviewee gave embellished answers or they too extreme answers, because of frustration. Furthermore, there were also perceptible thoughts of preserving the old working habits, but also hope for finding new way of working.

5.5 Recommendation for the future research

Technology is moving fast, and digitalization is here already. As said in introduction people are getting more data from in blink of eye and corporations must keep up in this run. Next generation will need answers fast and if your technology can’t provide them, they more likely change to partner who can give answer right away.

This type of behaviour is already on going and this will be major game changer in a near future, which will be also one of the keys to success to add value to companys service.

The study showed how difficult it’s to change current system (currently: CRM) to current ERP system, which creates next questions: Which ERP system would give most beneficial results for Mesvac? And how migration for Hörmann SAP-system should be done if this option is used?

Mesvac Oy is very different situation than other Hörmann Group countries and subsidiaries, because of strong stand of its service department. This should be one of the key topics when negotiating ERP exchange with Hörmann Group in a future. As a pilot project this can be multiply for other countries as well, if it’s success. I highly recommend researching this topic in near future. In these scenario Mesvac would build own IT-infrastructure (ERP + CRM) which should be linked to Hörmann’s SAP ERP system through data conversion centrum as figure 17 shows.

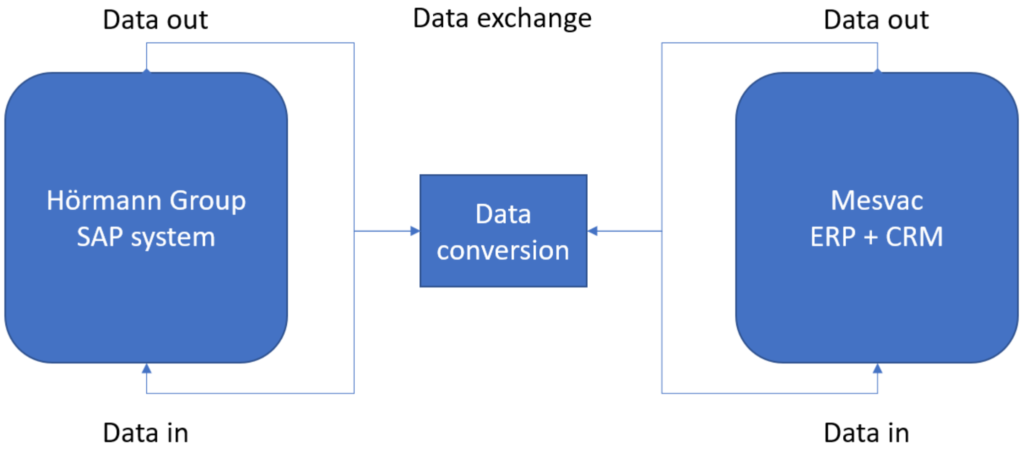

Figure 17. Data exchange through two ERP systems

Or option b) Should Mesvac Oy start to prepare for SAP-system? This option is more likely to happen in future, if first option isn't possible scenario.

This is also very good topic for future research, because right now Hörmann doesn't have tools how to synch maintenance functions to SAP-system. Therefore, future research on this topic should be on table, because service business is one of two main income sources in Mesvac Oy and this should be covered to maintain current business competitiveness on the market.

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Appendices

Appendix 1. Interview Questions

MBA – Mesvac Oy kyselylomake

ERP

Milloin nykyinen Visman ERP otettiin käyttöön Mesvac Oy:ssä? Kuinka hyvin järjestelmän ominaisuudet tukevat liiketoimintaa?

Millaisia etuja/mahdollisuuksia kyseinen järjestelmä tuottaa myynnille? Muulle organisaatiolle?

Millaisia haasteita Visman L7-järjestelmä luo tällä hetkellä myynnille? Muulle organisaatiolle?

Millaisia haasteita uusi toiminnanohjausjärjestelmä jalkauttaminen toisi Mesvac Oy:lle? Esim. SAP-järjestelmän jalkauttaminen Hörmann Groupin toimesta.

CRM: nykytilanteen kartoitus

Millaisia myynninjohtamisen työkaluja Mesvac Oy käyttää?

Miten käytössä olevia työkaluja käytetään myynnin seuraamiseen ja ohjaamiseen?

Kuinka yksittäisen myyjän myyntiprosessin vaiheita voidaan nykyisellä työkalulla seurata?

Kuinka yritys varmistaa asiakastietojen pysyvyyden yrityksessä? (ns. hiljaisen tiedon pysyvyys)

Kuinka nykyinen myynninweb-järjestelmä poikkeaa perinteisestä CRM-järjestelmästä?

Millaisia hyötyjä nykyinen myynninweb-järjestelmä tuottaa myynnille? Muulle organisaatiolle?

Myyntikonfiguraattorin paikoittainen toiminnan hidastuminen on havaittu alentavan myyntiorganisaation tehokkuutta. Millaisia toimenpiteitä tarvitaan, jotta kyseinen asia saadaan ratkaistua?

Miten nykyisen myyntikonfiguraattorin vaihtaminen auttaisi asiaan? Millaisia haasteita vaihtaminen luo nykyiselle järjestelmälle?

Miten nykyinen myynninweb-järjestelmä tukee avainasiakkuuden hallintaa?

Miten asiakastietoja pyritään hyödyntämään markkinoinnissa?

Kuinka tällä hetkellä avainasiakkuuksia hallitaan? Ja millaisia haasteita toimintatavassa on?

Miten asiakastietoja pyritään hyödyntämään markkinoinnissa?

CRM: tarvekartoitus

Millaisia mahdollisuuksia uuden CRM-järjestelmän jalkauttaminen toisi myynnille? Muulle organisaatiolle?

Millaisia haasteita uuden CRM-järjestelmän jalkauttaminen toisi myynnille? Muulle organisaatiolle?

Millaisia mahdollisuuksia uusi CRM mahdollistaisi avainasiakkuuden hallinnassa?

Millaisia mahdollisuuksia uusi CRM-järjestelmä mahdollistaisi markkinoinnin näkökulmasta?

Arvon luonti

Miten Mesvac Oy luo asiakkailleen arvoa?

Kuinka arvon luontia hyödynnetään myynnissä? Muualla organisaatiossa?

Appendix 2. Questionnaire 1

CRM kyselylomake

IT

1) Onko tuotteessanne avoin rajapinta?

Kyllä Ei

2) Oletteko aiemmin tehneet integraatiota Visman L7 ohjelmiston kanssa?

Kyllä Ei

3) Onko tuotteestanne saatavan ”on-site” ratkaisua?

Kyllä Ei

HS / Key Account

4) Onko tuotteessanne mahdollisuutta jatkuvasti päivittyvään kaksisuuntaiseen tiedonsiirtoon?

Kyllä Ei

5) Voiko tuotteessanne antaa erilaisia tehtävän antoja sisäisesti?

Kyllä Ei

6) Onko tuotteestanne mobiiliversiota?

Kyllä Ei

7) Onko tuotteessa haku ominaisuus asiakassegmenteittäin?

Kyllä Ei

8) Onko järjestelmässä mahdollista tehdä eri tasoisia merkintöjä?

Kyllä Ei

Merkitse mitkä tasot ovat mahdollisia.

a. Asiakastasolla?

Kyllä Ei

b. Kohde tasolla?

Kyllä Ei

c. Sopimus tasolla?

Kyllä Ei

d. Laite tasolla?

Kyllä Ei

9) Tarjouskannan ja tilauskannan raportointi mahdollisuus?

Kyllä Ei

Myynti

10) Onko tuotteen sisälle rakennettavissa oma laskenta konfiguraattori?

Kyllä Ei

Konfiguroitavia tuotteita XXX

11) Onko tapaamisten mahdollista linkittää Outlookiin?

Kyllä Ei

12) Onko tuotteella karttaominaisuutta reitin suunnitteluun?

Kyllä Ei

13) Onko tuotteella dashboard ominaisuutta, jota voi muunnella tarvittaessa? Kyllä Ei

14) Onko tarjouksien seurannalle automaattista muistutus ominaisuutta?

Kyllä Ei

Myynninjohtaminen

15) Onko tuotteessa helposti seurattavat aktivisuuden mittarit?

Kyllä Ei

Yleistä

16) Käytättekö integraatioissa yhteistyökumppaneita?

Kyllä Ei

17) Onko konfiguraatiossa mahdollista käyttää L7 tietokantaa?

Kyllä Ei

18) Onko ohjelmassa mahdollista sisällyttää myös huollon toimintoja?

Kyllä Ei

Kuvaus L7 integraatiosta:

Uudessa järjestelmässä tulee olla kahdensuuntainen integraatio L7:n kanssa ainakin yritysrekisterin ja tarjous/tilauskäsittelyn osalta.

Tuoterekisterin osalta riittää pelkkä luku.

Asiakkuuksienhallinta täytyy hoitua kokonaisuudessaan molemmissa järjestelmissä reaaliaikaisesti.

Tarjouksia tehtäessä uuden järjestelmän pitää pystyä poimimaan oikea tarjousnumero L7:sta sekä luomaan tuote- ja osapuolitiedot (erittäin isoja tietokantatauluja).

Kun tarjousta muutetaan tilaukseksi, pitää vastaavasti poimia oikea tilausnumero.

Integraatio on suoritettava yhteistyössä Visman kanssa.

Hinta ja aikataulu

Käyttäjien lukumäärä: 15 hlö

19) Projektin käynnistysmaksu

____

20) Tuotteen käyttäjämaksut/kk (15 kpl)

____

21) Integraation toteutuksen hinta-arvio? (oma tai alihankkijan arvio)

____

22) Toteutuksen kokonaisaikataulu arvio?

____

(sis. integraation, käyttäjien koulutuksen, jalkautuksen)

23) Konfiguroinnin hinta? (mikäli ei sisälly käyttäjämaksuun)

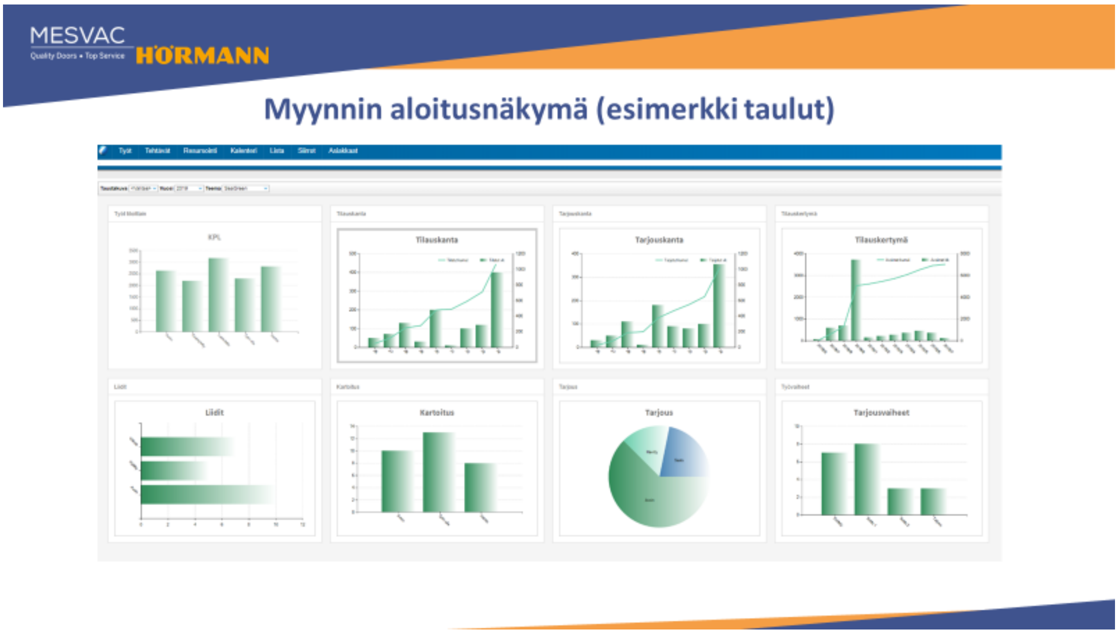
____

24) Muut kustannukset? (huollon toiminnot yms.)

____

Tutkimus tehdään osana MBA-loppututkintoa, jossa kartoitetaan Mesvac Oy:lle parasta mahdollista vaihtoehtoa olemassa olevaan ERP-järjestelmään. Vastaukset arvioidaan ja pisteytetään Mesvac Oy:n painoarvojen mukaisesti. Kyllä-ei vastauksissa riittää vastausvaihtoehdoksi tekstin boldaus.

Appendix 3. CRM features



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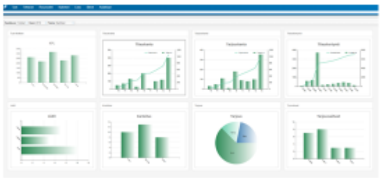
Aloitusnäkymä



- Näkymien tarkoitus antaa myyjälle mahdollisuus nähdä tämän hetkinen kokonaistilanne aikaisempaa paremmin ja pystyä hyödyntämään ajankäyttöä vielä entistä tehokkaammin kiinnostavien kohteiden tarkempaan seurantaa varten.
- Mahdollisuuksia: tauluista linkitykset kesken eräisiin tai avoimiin työtehtäviin tai sovittuihin tauluihin. Tähän on mahdollista saada myös liikevaihdot, kate tai muita vaihtoehtoisia tauluja, jotka linkittyy järjestelmästä saatavaan tietoon.
- Mitä näkymiä näette itse tärkeiksi oman työn kannalta? Kuvassa esimerkkejä tauluista.

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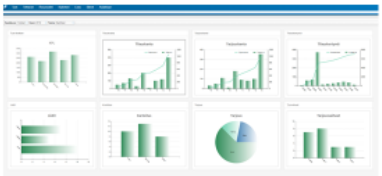
Toiminta webissä



- Nykyisin käytössä tehtävä tyypit: tarjous ja tilaus.
  Jatkossa tehtäviätyyppejä on tarkoitus lisätä, jotta vaiheiden seuranta helpottuisi ja selkeytyisi. Esimerkiksi seuraavasti: liidi, esikartoitus, tarjous ja tilaus. Näitä työvaiheita voimme jatkossa seurata paremmin, kun ne löytyy kirjattuna järjestelmästä.
- "Liidi": myynninsähköpostiin tulevat tarjouspyynnöt olisi mahdollista siirtää suoraan tänne jolloin vastuuhenkilöksi nimetään aluemyynitipäällikkö. Mukaan voidaan lisätä myös liitteitä. Tällöin uudet tarjoukset eivät "roiku" enää sposteissa, vaan ovat jos järjestelmässä suoraan.
  Jotta voidaan siirtyä esikartoitukseen on liidi merkattava valmiiksi. (tilat: avoin, työn alla, keskeytetty ja valmis).
  Siirtyminen esikartoitukseen tapahtuu normaalisti kopiomalla.
- Esikartoitus (nykyinen: toimenpide) kohdassa lisätään sovitut tapaamiset/asiat sekä päivämäärä. Näin saamme historia tiedon pysymään projektin takana (tätä jatkossa hyödyntää myös tuuraajat) Ennen tarjousta esikartoitus merkataan valmiiksi. Siirtyminen tarjoukseen tapahtuu normaalisti kopiomalla, jolloin tiedot saadaan myös tarjoukselle.
- Tarjous tehdään normaalisti kuten tähänkin asti. Ainoa muutos on työtehtävän/tehtävien automatisointi tarjouksen valmistumisen jälkeen. Tämän tarkoitus on muistuttaa projektista ja sen seurannasta sovittuna ajankohtana tarjouksen tekemisen jälkeen. Tekemättömät tehtävät näkyvät etupaneelissa.
- Tilaukselle voidaan myös luoda tehtäviä, jos näette ne tarpeellisiksi.
  Onko muita välivaiheita, joita näkisitte tarpeelliseksi?

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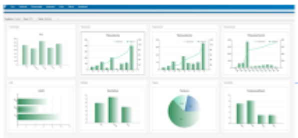
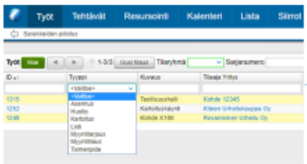
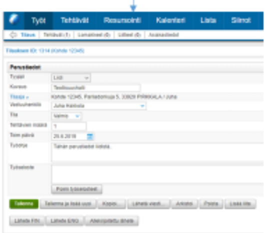
Myynnin CRM – polku (1/2)



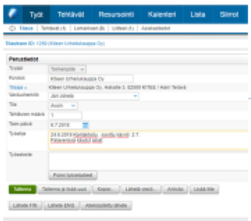
Aloitusnäkymä – työnohjaus ja seuranta



Työt välilehti – tyyppikohtainen projektiseuranta



Liidi – myynnin s-postin liidit siirretään järjestelmään. (avoin, kesken, valmis)
Kopioidaan toimenpiteeksi/Kartoitukseksi ja tila merkataan valmiiksi.



Toimenpide/Kartoitus –sovittujen asioiden kirjaaminen.
Kopioidaan tarjoukseksi ja tila merkataan valmiiksi.

Tarjous

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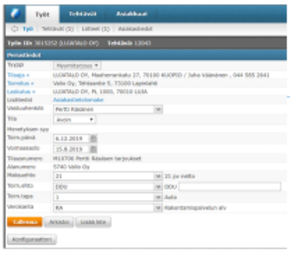
HÖRMANN

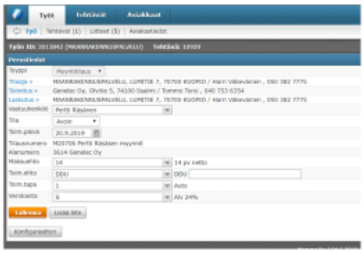
Myynnin CRM – polku (2/2)



Tarjous – automaattinen tehtävien luominen.
Tarjousten seuranta – esim. 1 vko tarjouksen jättämisestä
tai useampi seurantatoimenpide.
Konfigurointi edelleen pysyy vanhassa järjestelmässä. Sen tehostamiseen
pyritään löytämään keinoja (Visman asiantuntija katsoo läpi laskennansäännöt)

Toimenpiteet voidaan linkittää projektin tilaan:
Esim. 2 tehtävää, joista toinen merkattu tehdyksi = työn alla.

Kopioidaan tilaukseksi ja tila merkataan valmiiksi.



Tilaus – normaalisti järjestelmään.
Näettekö tarvetta tilaukselle jotain
tehtäväseurantaa?

Tilamerkintä:
Muutoksia tulossa tulossa = työn alla
Valmistilaus = valmis jne.