



Transformation Towards Sales Culture: Case Company X

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ABSTRACT

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Change in the business world of today generates constant pressure on companies, and organisational change is rather impossible to successfully manage without the full support of the corporate culture, as culture is the driving force of an organisation. How can companies keep up with the change and begin a transformation project without losing touch of the corporate culture?

This research was commissioned to a case company Company X in Finland, which started an organisation-wide culture transformation project in March 2020. A new CRM tool, Salesforce, was introduced to use in hopes of advancing the organisational culture change towards a sales-focused sales and client leadership culture. The goal of this research was to find out how successful the start of the transformation was and whether the organisation was moving towards the right direction in terms of a full-scale cultural change.

The research was conducted as a case study with a mix of qualitative and quantitative methods. Data was collected through a questionnaire, of which a total of 77 responses were received. Secondary sales data provided by the case company. The sales data was extracted from the case company's previous ERP system and compared with Salesforce's data extract to find out indications of changes in sales-related behaviour.

The results indicated that the case company was progressing towards successfully changing its organisational culture; employees were supportive of the change and the behavioural patterns related to sales activities indicated increase and positive developments. However, some adjustments would need to be made to ensure the employees' continued level of motivation and commitment towards the transformation goals, which for example were: continued and more focused training and sharing knowledge, ensuring leaders show example, strategy reminders and also creating a better model for goals and compensations.

Key words: sales culture, organisational culture, organisational culture change, sales management, sales culture change, culture change, CRM

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1 INTRODUCTION

It was Winston Churchill who said that “to improve is to change; to be perfect is to change often” (Lewis 2011). Change in the business world of today is nothing new and the pressures of the constantly changing environmental and technological surroundings have a huge impact on organisations and their cultures as well. The question is: how to keep up with the change without losing touch of one’s corporate culture? Organisational change is rather impossible to successfully manage without the support of corporate culture, as culture is linked to anything and everything; it leads the way of the organisation towards the common vision and strategy. Cultures are important and maintain a lot of power, since they determine what the company is capable of doing (Katzenbach, James & Gretchen 2018).

This research was commissioned to a case company Company X, which started and continues to undergo a culture change since March 2020. This research aims to find out how successful has the start of transformation towards sales and client leadership culture been so far, and whether the organisation is moving towards the right direction in terms of a full-scale cultural change. Based on the findings, the aspiration is to locate indications of potential problems or challenges and also, to find insight on what kind of corrective actions would be required for succeeding better.

1.1 Background

A new customer relationship management (hereinafter CRM) tool, Salesforce, was introduced to use in Company X on 31 March 2020, which was the starting point to a drastic and comprehensive transformation journey and culture change towards a sales-focused organisation culture. The transformation towards a more structured and focused sales and client leadership culture became part of the new strategy of the case company and the vision was to not only to create a stronger and aligned sales culture where sales activity and opportunity recording are done timely and proactively by the employees, but also to deliver better customer experience and build better relationships, ensure transparency into the

company's and also global network's sales management pipelines, increase collaboration, as well as eventually increase win rates (Internal material, 2020).

One of the most visible changes in terms of behaviour was that Salesforce licenses were only granted to a limited number of employees, who were closely related to sales operations. This meant that the tasks, such as opportunity and client data recording, which were performed by the administrative personnel before, needed to now be completed by the license holders instead. In fact the previous Enterprise Resource Planning (hereinafter as ERP) system utilised at Company X was not a proper CRM tool, as only the won proposals were recorded and therefore, there was neither visibility over all of the cases nor on the case company employees or client contacts behind them. Therefore, the new CRM tool was indeed needed.

1.2 Case company

This thesis was conducted to Company X, which is a Finnish member firm of a global network of organisations. It is a member firm of a global network, which operates in more than 150 countries and with more than 284 thousand employees. The Finnish firm employs around 1 200 people across 13 offices in the fields of consulting, deals, tax, legal, audit and other assurance services.

Due to the size of the network and competitiveness of the field, changes needed to be made in terms of sales management in order to keep up with the perpetually developing business environment and to make engagements more profitable to the organisation. This is why the new strategy of the case company was focused on sales and client leadership, and why the new CRM tool was introduced to use.

1.3 Objectives

The purpose was firstly to measure the progress of the organisational culture change methods introduced in the case company in the context of sales and client leadership and secondly, find out useful information for continuing with the journey towards successfully adopting a new company culture. Or in other words, how to make organisational culture change a success story.

The focus of this research was to see whether introducing the new CRM tool, Salesforce, has increased and helped change the sales and client leadership behaviour so far. Have employees in fact started entering sales-related activities and opportunities in increasing amounts, and most importantly, has the case company's culture and employees shown change towards behaviour that focuses on sales and client leadership? Do the employees really understand and advance the communicated notion behind the new strategy and the change it brings?

1.4 Research question

The research question of this report was formulated based on two main areas of focus: organisational culture transformation and sales activity management, both of which are incorporated into the key research question and its sub-questions stated here.

Is the case company on the right track towards successfully changing its organisational culture?

- Are the employees motivated to use Salesforce and do they support the organisational culture change?
- Is the current organisational culture, leadership and employee behaviour showing focus towards sales and client leadership since Salesforce was adopted?
- Did the adoption of Salesforce encourage and increase sales-oriented behaviour in the case company?

1.5 Delimitations of the study

Since conducting a research on company culture change can be a wholesome and lengthy process, this study was only limited to reflecting on whether the case company is moving towards the right direction in terms of its sales culture adoption process. The reason was that the period during which this study was performed is not long enough for thoroughly investigating long-term culture change in an organisation. Additionally, since the focus point of this study was limited to sales culture, merely the personnel taking part in the sales-related operations on

a daily basis were asked to answer to a questionnaire for the purpose of this study.

The methods chosen to conduct this research were knowingly limited to the analysis of questionnaire results and data extract, since they would best help bringing out answers to the research question presented in this report. There were plenty of internal communications, materials, training and so forth available for investigation in terms of the transformation project, however, those were scoped out due to being excessive for this study in question. Merely a few materials related to strategy and vision of the change project were utilised to help present the background of this study, this was mentioned in section 1.1. of this report.

1.6 Research structure

As presented in Figure 1, this Master's thesis consists of four key sections: theory, research methods, results and discussion. First is the theory section, in which the theoretical frameworks around organisational cultures as well as sales management are introduced. The organisational culture part covers the basics of corporate culture, some of the key cultural models and sums up some of the themes around culture change. Sales management proportion focuses instead on the sales management aspects, such as CRM and creating and managing a sales culture.

This is followed by the research methods portion, which covers the empirical aspect of this study. It consists of a description of the research process and methods chosen for data collection, which were questionnaire, extracting and analysing data provided by the case company and observation. Observation was not a primary method, hence the slightly different coloring as seen from Figure 1. The paragraph also presents how the data was analysed and lastly, but very importantly, a contemplation of the ethics of this research.

Moving on to the actual collected data: the chapter titled "research results" summarises the findings of the data extract analysis and the questionnaire. The questionnaire results are divided into two headlines: 1) sales culture and transfor-

mation and 2) sales activities and opportunities, the first one referring to the organisational culture aspect and the second to sales management, following the similar structure as in the theory section.

Lastly, the discussion paragraph presents the key themes, which were formulated based on the findings presented in the research results part of this thesis. And based on those key themes, conclusions and recommendations are introduced. This report is finalised by giving suggestions for further research that came up as a result of this study.



FIGURE 1. The research structure.

2 ORGANISATIONAL CULTURE

In this chapter, the theoretical framework relating to organisational culture and culture change are presented. This section consists of a definition of culture, followed by a reflection on culture's linkage with strategy, the different theories of organisational cultures and lastly, organisational culture change to wrap up the theory discussion. The purpose is to present existing literature and reflect it on the topic in question.

2.1 Defining culture and organisational culture

The definition and contents of culture has been argued by experts for ages, which is why it is safe to say that there are quite a few different ways to define it. Hofstede, Hofstede and Minkov (2010, 516) assert that culture is “the collective programming of the mind that distinguishes the members of one group or category of people from others”, while Trompenaars & Hampden-Turner (2020) define that culture to an organisation is what personality is to an individual: a hidden, but unifying theme, which gives meaning, direction, and mobilisation that are key in the company's ability to deal with the challenges it faces. Katzenbach et al. (2018), on the other hand, indicate that such factors as shared attitudes, habits and behaviour, emotions and how a group sees the surrounding world, as well as the unspoken expectations we pose to one another while working together, are what creates a company culture.

Williams (2015) shares that there are three different senses when it comes to culture; process, group's way of life and activity. Seeing culture as a process refers to individuals' cultural enrichment or, in other words, being cultured, while understanding culture as a certain group's way of life can for example refer to the culture that a certain country or company portrays. Lastly, culture as an activity relates to the culture learned for example at museums, concerts or through books. When discussing culture people tend to lean on one of the three aspects, as they all are very different and they compete with one another. (Rothman 2014; Williams 2015.)

Each company's culture can be seen for example through how the leadership behaves, how the organisation communicates both internally and externally and also, how open they are about their affairs and operations. But what really makes an organisational culture? There are some key factors identified, such as 1) values, 2) hierarchy, 3) urgency, 4) orientation and 5) subcultures. Firstly and most importantly, each organisation has their core values and characteristics, or traits, which create the heart of the company: these key traits are shared across the company forming a basic structure of how the group of employees think, feel, and behave. It is essential for the leaders to recognize and understand them in order to seamlessly face and handle the cultural challenges met on the way. (Katzenbach et al. 2018; SHRM n.d.)

Secondly, the degree of hierarchy also plays an important role in the company culture, as it shows the extent to which the traditional channels of authority are followed and how formal it is. The degree of urgency instead states how fast decision-making and innovation processes are driven, while the fourth factor, orientation, refers to companies' dominant way of valuing either people or tasks and choosing which functional areas to focus on in their everyday businesses. (SHRM n.d.)

Lastly, to make it even more complex, culture not only is led by its overall features, but also forms many subcultures. The subcultures of a company can be for example based on the field, product line, geographical location or leadership, and they can sometimes be as strong or even stronger than the dominant organisational culture. Especially now during the 21st century, subcultures' alignment has become vital due to company mergers and acquisitions in which cultures also merge with one another; globalisation, which enables multicultural organisations and technological advancements allowing employees to work more flexibly when and where they want to. It is essential for the leaders to understand and manage the subculture dynamics and ensure that they are in line with the company's mission and goals. (Kotter 2012, 156; Schein 2009.)

Hofstede has identified a total of four types of cultures, which are: optimal, actual, perceived and ideal work environment culture. Optimal culture aims to answer one of the key questions arose when investigating organisational cultures – which

type of culture should organisations strive for? Actual culture, on the other hand, measures simply the culture each organisational currently has and perceived culture is the culture that people in the organisation think it has. Lastly, the ideal work environment measures what kind of culture the employees would love to have. (Hofstede Insights 2019.) What makes this interesting is the fact that inside a company there must be differences in how people perceive their current culture and where they would personally like the company to be at. Up to some point the employees can and should have a say on it, but, eventually it is the leadership that guides the way.

To highlight the importance of culture it needs to be said that when an organisation sustains a strong culture, employees fully understand what the management is expecting from them and know to expect a reward for acting under the organisation's values (SHRM n.d.). As mentioned above, the leaders' role is central. When leaders really comprehend the cultural pinpoints and challenges of their company, they are able to lead and navigate the organisation towards the desired direction far more efficiently.

2.2 Culture as a strategic asset

Having said that there are many ways to define culture, its huge importance in terms of organisation's success and strategic value has been acknowledged by many. Organisational culture is a strategic asset, which increases the adaptability and suitability of an organisation and its environment (Aktas, Cicek & Kiyak 2011, 1561). Strategy together with culture are the key elements used by the leadership in hopes of maintaining organisational viability and performance; strategy guides people and leads the company towards its goals, while culture not only explains the goals through values and beliefs, but also helps guide tasks through shared assumptions and group principles (Groysberg, Lee, Price & Cheng 2018). This is why it is easy to see the enormous impact the different cultural aspects have on organisations and how challenging it is to really comprehend and manage them for the benefit of the company.

Katzenbach et al. (2018) state that there is a strong link between company culture and strategy and operating model – business strategy helps direct the company

to the desired direction and the operating model provides the plan to reach there, whereas culture is the motivation that guides and supports these two. Culture indicates the level of commitment and passion the employees have for reaching the wanted goal and instead of trying to fix a company culture, it should be aligned with the strategy. (Katzenbach et al. 2018.) This coherent triad of business strategy, operation model and culture is indicated in Figure 2.

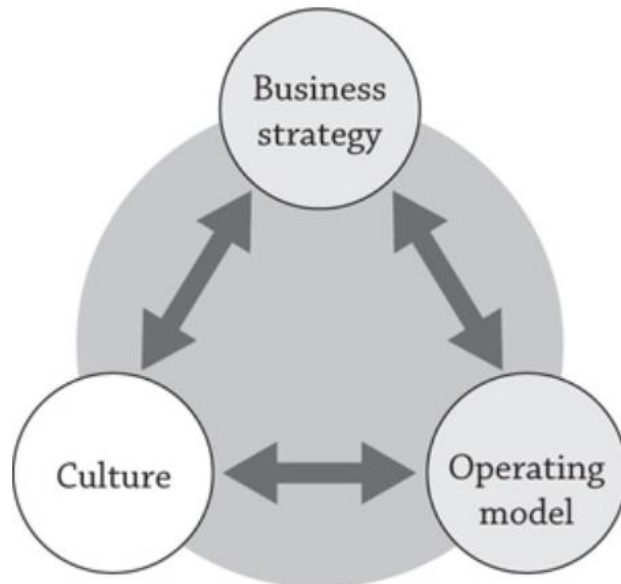


FIGURE 2. The triad of business strategy, operation model and culture (Katzenbach et al. 2018).

2.3 Theories of organisational cultures

When it comes to changing company culture, the first step that the leadership needs to take is to create an accurate description on the problem and the kind of change they want to make. The second step is to assess the current culture and evaluate how it will assist or slow the change process down. (Schein 2016, 271.) There are multiple theories available and a lot of interesting research conducted on the topic, however, for the purpose of the report, the models by researchers such as Schein, Hofstede, Trompenaars and Schneider were chosen. They are probably the most commonly known and referenced theoretical frameworks for assessing and defining organisational cultures.

2.3.1 Schein's model

According to Schein it takes time for companies to build a culture. Employees start forming it based on their past experiences, after going through changes and having to adapt to changes in environment. (Juneja n.d.) Schein's model states that cultures can be, in general, analysed in three different levels: artifacts, espoused beliefs and values and basic underlying assumptions, as indicated in Figure 3. The term "level" refers to the degree in which a cultural phenomenon is visible to an observer, and the levels vary from clearly open and tangible manifestations to intangible and unconscious conclusions, which are at the core of the culture. (Schein & Schein 2016, 17-18.)

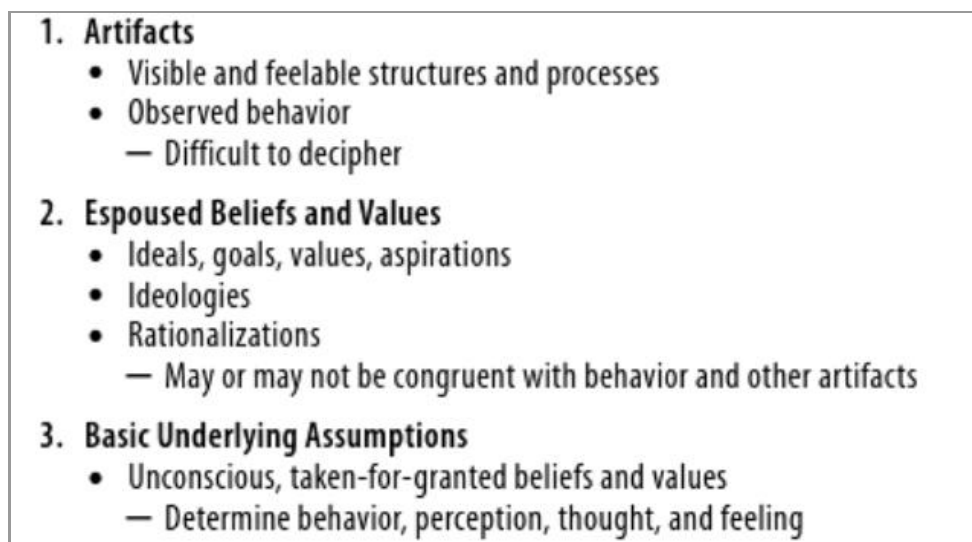


FIGURE 3. The three levels of cultures (Schein & Schein 2016, 17).

Schein and Schein (2016, 17) define artifacts as “the phenomena that you would see, hear, and feel when you encounter a new group with an unfamiliar culture.” Artifacts can for example include such visible matters as routines and manners, language, technology, style, emotions, clothing, et cetera. Most especially, it is the climate, or the manifestation of a certain group's culture, that counts. It should be pointed out that at this level of culture, the assumptions are easy to observe, yet hard for an outsider to interpret. (Schein & Schein 2016, 17-19.)

Once a new group has been created, they will slowly start creating shared values or beliefs, which, if proven useful, ultimately turn into assumptions shared by the entire group. This starts happening once the new group is first confronted with

challenges that need solving; in this phase the group starts already identifying leaders, as some of the individuals naturally try to influence others to adopt an approach of their choosing. As soon as the members solidify these mutual beliefs and values, they are to be taken for granted inside the group. When analysing espoused beliefs and values one should remember to not only sort out the ones coherent with the assumptions that guide performance and those part of the ideology or philosophy of the company, but also the rationalisations or future goals. This is due to the fact that espoused beliefs and values are in most cases so abstract that they can be inconsistent with one another. (Schein & Schein 2016, 19-21.) One practical example of this would be a company whose strategy is to focus on impeccable quality, and radically diminishing all operating expenses both at the same time. These both aspects can be difficult for the employees to deliver.

“When a solution to a problem works repeatedly, it comes to be taken for granted” (Schein & Schein 2016, 21). Therefore, if a certain hypothesis has repeatedly been proven useful, the group starts to slowly treat it as reality. Basic assumptions are the factors that determine what we pay attention to, what different things mean for us, how we react and what actions we choose to take in different scenarios. These basic assumptions generally are non-debatable and non-confronting, which means that it is incredibly difficult to try and change them. People also tend to be most comfortable among the likes of people sharing similar assumptions. As an example, basic unconscious assumptions stem from the fundamental aspects of life, such as human nature and activities, group and individualism, the importance of work and family, role of men and women and so on. Broader assumptions about human nature are what usually derive from the vast culture where the organisation belongs in, or from the units across companies. (Schein & Schein 2016, 21-25.)

This three-level model of culture by Schein & Schein (2016, 29) highlights the importance of differentiating the visible and experienced artifacts from the mutual beliefs and values (the espoused values) and from the basic underlying assumptions that lead the behaviour. Siame-Moono (2018) also asserts that the artifacts of cultures are easily adaptable and can be quite effortlessly changed, however the latter levels are harder to adjust since they are deeply embedded in cultures.

2.3.2 Hofstede's model

Geert Hofstede together with his team conducted a study of organisational cultures in 1980's, which helped to identify six dimensions of organisational cultures based on strategic practices: 1) process-oriented versus results-oriented, 2) employee-oriented versus job-oriented, 3) local versus professional, 4) open system versus closed system, 5) easygoing work discipline versus strict work discipline, and 6) internally driven versus externally driven (Hofstede et al. 2010, 354; Hofstede Insights n.d.). Each of these practices are detailed below.

Process-oriented versus results-oriented

The effectiveness of the organisation is the core of this first dimension; process-oriented culture focuses on the way the employees carry out the work and on the results-oriented culture, the focus is reaching goals or results. Employees are more likely to avoid risks and special attention is paid to following rules and regulations as well as monitoring in the process-oriented culture, whereas in a very goal-oriented culture risk-taking is normal when putting in maximum efforts. (Hofstede et al. 2010, 355; Hofstede Insights n.d.) Companies working for example in the field of consulting services would most probably fall into the category of process-oriented culture, since everything is highly regulated and quality is controlled by multiple external parties.

Employee-oriented versus job-oriented

Employee-orientation focuses on one end more on employees and on the other end on the completion of job. Employee-oriented cultures are where employees feel that their personal issues are paid attention to and that the company takes responsibility over employee satisfaction and welfare and that relevant decisions were made by groups or committees. In work-oriented organisations, high pressure to do the work at the expense of employees can be experienced. The employees in this culture perceive that only the work that they do interests their leaders. (Hofstede et al. 2010, 356; Hofstede Insights n.d.)

Local versus professional

The identity of employees working in a local culture strongly stems from the organisation; they are very focused internally and there is a strong social control to be like everyone else under the same unit. Also, employees' social and family background are taken into account as much as their competence for the job. In a professional culture, on the other hand, each employee's identity is determined by profession and role in the company instead. (Hofstede et al. 2010, 356-357; Hofstede Insights n.d.)

Open system versus closed system

This dimension answers to the question: how accessible is the organisation? Open culture welcomes new employees and is in general, very open both internally as well as externally. (Hofstede et al. 2010, 357; Hofstede Insights n.d.) Closed culture is the opposite; closed and secretive, as described by Hofstede et al. (2010, 357): "In the closed system units, the organization and its people were felt to be closed and secretive, even among insiders; only very special people fitted into the organization, and new employees needed more than a year to feel at home (in the most closed unit, one member of the managing board confessed that he still felt like an outsider after twenty-two years)."

Easygoing work discipline versus strict work discipline

In the fifth dimension, the core lies in the internal structuring, level of control and discipline of an organisation. Easygoing cultures have agile structures, are unpredictable and have a low level of control and discipline, costs are secondary issues on the agenda. However, in a stricter work discipline, employees are cost-conscious, punctual, serious and unwritten codes for instance related to clothing and behaviour can be often noted. (Hofstede et al. 2010, 357; Hofstede Insights n.d.) Presumably some of the older and bigger law firms could more likely be categorised as having a stricter work discipline, while some smaller and agile startups would be more easygoing. Which is of course an overly generalised assumption, however, helps alleviate the pain of trying to figure out to which extreme end which company could be allocated to.

Internally driven versus externally driven

This last dimension deals with customer orientation. In an internally driven culture it is obvious for the employees that they themselves know what is best for the customer and to the world outside – they emphasize organisational procedures, rather than gaining results. Whereas in externally driven cultures it is common to emphasize customer needs. (Hofstede et al. 2010, 358; Hofstede Insights n.d.)

After taking a look at the six dimensions structured by Hofstede et al., it is worth mentioning the criticism this model, like most other models as well, has received. The model has been criticised for many reasons, for instance for being outdated, for the method in which the data was collected – a survey, for the fact that the data was collected from one company – IBM, and also for the fact that six dimensions are not enough for determining organisational cultures (Eringa, Caudron, Rieck, Xie & Gerhardt 2015, 187-188; Orr & Hauser 2008, 6-10). It is needless to say that no model is exhaustive; meaning that everything is not as black and white in terms of cultures and investigating cultural distinctions of organisations, however, they provide an excellent method and framework for identifying the key points, which then again help investigating further and utilising that valuable data for the company's advantage. That should be the main focus when investigating cultural aspects.

2.3.3 Trompenaars' model

Trompenaars and Hampden-Turner (2020) assert that cultures ought to be investigated in the way through which they choose solutions to problems, and the problems should be looked into under these three categories: those arising from people's relationships, those appearing within time and those relating to the environment. Based on the solutions chosen by the cultures, the seven fundamental dimensions of culture, usually referred to as Trompenaars cultural dimensions, can be identified. (Trompenaars & Hampden-Turner 2020.) Figure 4 presents the dimensions.

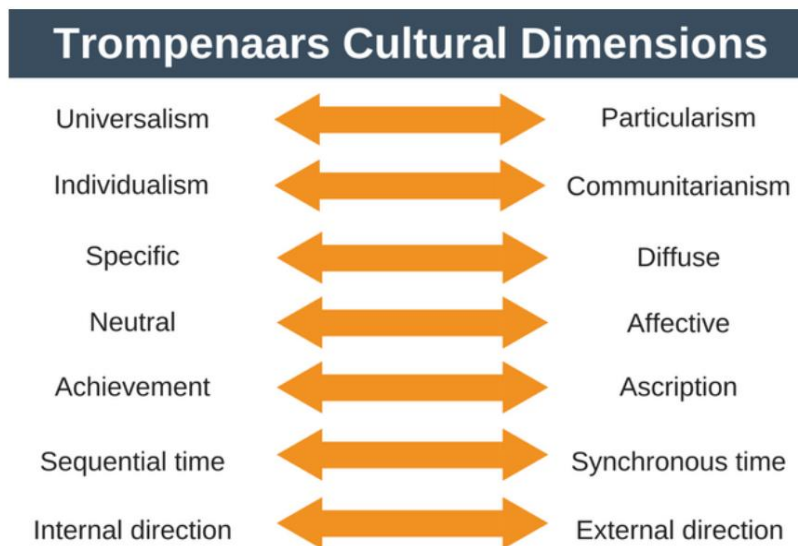


FIGURE 4. Trompenaars Cultural Dimensions (EPM, n.d.).

The first cultural dimension, **universalism versus particularism**, refers to rules versus exceptions, or in simpler words, how we judge other people's behaviour. Universalist cultures encounter being obligated to maintain the universally agreed standards of their culture, while the particularist cultures are more obliged by their relationships. For example, cultures leaning towards particularism pay special attention to friendship and less attention is given to abstract societal codes, while universalist cultures are more rule-based and following of standards and values is important. (Trompenaars & Hampden-Turner 2020; Mulder 2015.)

The second dimension focuses on the conflict between individuality and the interest of the group and common goals; the key question is whether the people primarily consider themselves as individuals or part of the group? **Individualistic** organisations have been constructed to serve individual owners, employees and customers and relationships are built for the purpose of individual interests, whereas in **communitarian** organisations it is the community and sharing of social connection that creates meaning and purpose. (Trompenaars & Hampden-Turner 2020.)

Neutral versus emotional on the other hand relies on the degree of expressing feelings. Neutral cultures control and refrain from showing emotion, but emotional cultures express their emotions quite openly and spontaneously. (Trompenaars & Hampden-Turner 2020; Mulder 2015.) As a practical example of countries with

such cultures could be Japan or Germany as neutral and Spain or for example some of the Middle-Eastern countries as the cultures being more on the emotional side.

The culture's degree of involvement is measured on the dimension called **specific versus diffuse**. In a specific culture people easily share their space and approaching others can often be done very informally both in private and public context. In diffuse cultures, however, a level of formality is given great value to and each person's private space is more protected. (Trompenaars & Hampden-Turner 2020; Mulder 2015.) In the context of a business meeting specific cultures would for example be more likely to stick to a certain structure and keep their distance, while diffuse cultures usually want to mix their private lives more with the business and let the discussion flow in a more unstructured manner.

Trompenaars and Hampden-Turner (2020) state in the fifth dimension called **achievement versus ascription** that "all societies give certain of their members higher status than others, signaling that unusual attention should be focused upon such people and their activities." When achievement-centered cultures determine people's worth on how they perform and what they have achieved so far, the ascription-oriented cultures on the other hand consider that a person's status is based on such factors as age, class, gender, education and so forth. In short, the achieved status refers to doing and ascribed status to being. Respect in achievement-oriented culture can be gained through skills and knowledge, while seniority is what gains respect in ascribed cultures. (Trompenaars & Hampden-Turner 2020; Mulder 2015.)

Cultures have very different ways of measuring and understanding time, which is why the **sequential versus synchronous** time is defined as the sixth dimension. Sequential time is linear and measures the past, present and future in a concrete manner by using years, months, weeks, days and hours. Synchronous time, however, is more abstract and works on various projects at the same time – the focus is on the rhythm of the group and nature. (Trompenaars & Hampden-Turner 2020; Mulder 2015.) As an example, sequential cultures are more likely to have planned a project step by step in advance and most probably would be more aggravated

than the opposite cultures when encountering something surprising that makes them fall behind their schedule.

Lastly, the dimension of **internal versus outer direction** concentrates on how people experience their environment. Mulder (2015) states that “People in western cultures are mainly outer-directed and they want to control their environment as much as possible. In many non-western cultures it is more about living in harmony with the environment; there are forces that cannot be controlled or influenced and therefore you have to adapt yourself to these external circumstances.”

Trompenaars and Hampden-Turner (2020) argue that the seven linear dimensions of culture detailed above need to also be considered in two dimensions, which creates four orientation-based quadrants that can be used to identify organisational cultures: equality-hierarchy and person-task. Based on this, corporate cultures can be divided into four categories: family, Eiffel tower, guided missile and incubator, as depicted in Figure 5.

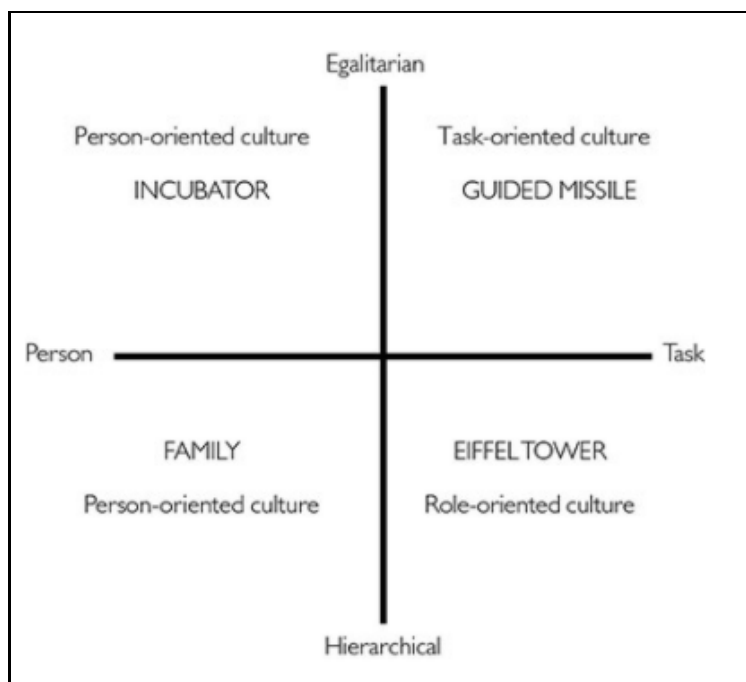


FIGURE 5. Four types of corporate culture (Trompenaars & Hampden-Turner 2020).

Organisations which have a **family-oriented culture** are not only personal with face-to-face encounters, but also hierarchical while carrying roles that could be

compared with a father and children of an actual family – this results in power-oriented yet caring culture. **Eiffel tower culture** is highly hierarchical as well as it symbolises leadership being narrow at the top and broad at the base; a stable and stiff culture where everything is coordinated from the top down. How it differs from the family-oriented culture is the strict distribution and coherence between the different levels; if one level does not perform their duties, everything fails. (Trompenaars & Hampden-Turner 2020.)

The guided missile and incubator cultures on the other hand are on the egalitarian side of the scale, which means that they are less hierarchical. The guided missile culture resembles the Eiffel tower in terms of being impersonal and oriented to tasks, however it is more rational as everything is performed keeping the strategy and targets in mind. Employees working in an incubator culture are person-oriented like the family culture and their motto is “existence precedes organisation”, meaning that companies should serve for their employees’ self-expression and self-fulfillment freely. (Trompenaars & Hampden-Turner 2020.)

Even though these four categories are recognisable by many, it is important to note that the world of today also has its own impact on cultures. Technological advancements have impacted and will continue to have a big influence on cultures, which gives an extra spice on the mix. That is what makes investigating and identifying cultures interesting yet challenging.

2.3.4 Schneider’s model

According to Schneider (2017) “Culture is essentially formed by what it takes for your people to fully deliver on your enterprise’s customer promise. It is driven by the nature of your business and what it takes for you to succeed in your marketplace.” Thus, Schneider’s model is based on four aspects: collaboration, control, competence and cultivation, which are also presented in Figure 6. Assessing organisation’s culture with the help of this model has been proven useful as a discussion tool for planning and during organisational transformation projects. (Patary 2015.)

Schneider Cultural Model

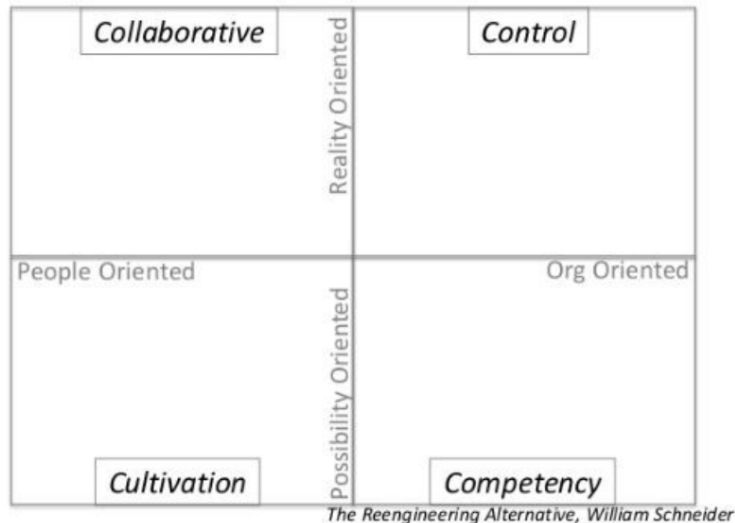


FIGURE 6. Schneider Culture Model (Patary 2015).

Controlling cultures enjoy certainty, predictability and safety; the core idea is that the organisation as a system comes first. In these organisations, power is the fundamental motive. Goals are carefully set and followed and it is extremely important to meet them. Organisations having a controlling culture usually find it difficult to maintain, grow and ensure the well-being and success of their company. To put it short; the motto of control cultures would be “we succeed by getting and keeping control”. (Patary 2015; Schneider 2000; Schneider 2017.)

In collaborative cultures working together, synergy and alliance is the key. These cultures ensure coherence and orientation towards customers. In such cultures, the link between experience and reality often imposes difficulties. As the third core culture we have a competence culture, which is all about distinction and being unique. In these cultures, the core is ensuring unparalleled products or services are being produced and also, achieving goals is essential similarly as in the controlling culture. (Patary 2015; Schneider 2000; Schneider 2017.) Schneider’s (Patary 2015) cultural model asserts that competency cultures can be briefly identified with the slogan “we succeed by being the best”.

Lastly, the cultivation culture is motivated by enrichment, growth and fulfilment of the customer’s potential. In this culture ideals and values are made real, focus is on linking what is absorbed and put to use. Value-centered goal achievement and

self-actualisation is important, and issues are likely to be caused by the connection between values and ideals and which of those are actually put to use and which one's not. (Patary 2015; Schneider 2000; Schneider 2017.) According to Schneider (2000), an issue is identified in this culture in terms of values: "the basic issue here is the connection between the values and ideals of the organization and the extent to which those values and ideals are being operationalized."

As already mentioned, the model by Schneider could be utilised as a brainstorming model for change projects – investigating and finding congruence from each of the four different aspects could help organisations to identify what the major cultural characteristics of their organisation are and what is leading the way of their company and employees' behaviour (Patary 2015). This information is vital when planning a change of any scale, since it is always something that needs careful consideration and complete understanding before jumping on it.

2.3.5 Reflection on case company's organisational culture

As characterised already in this report, there are quite a few literary reflections available on cultures that can help differentiate cultures from others and identify their special features. Even though organisations are a mix of many cultures, there usually is one dominant culture and several subcultures, all of which are together leading the way of the organisation. In this chapter, the author of this thesis presents a short summary of her personal point of view of the Company X's company culture with the help of the organisational culture theories already covered in this section of the report.

The Company X's organisational culture, at the time of the study was conducted, was dominated by goal-orientation, hierarchy and bureaucracy. The guided missile culture by Trompenaars & Hampden-Turner as well as Hofstede's results- and work-oriented culture models both portray similar characteristics: expertise is power and there is a strict orientation towards achieving goals; processes are somewhat heavy and bureaucratic, and top-down guidance on roles is strongly built in the organisation culture. The core of the culture is that the work needs to get done: if long working days are needed to get the job done, that sort of com-

mitment is unspokenly expected from the employees. In addition to that, the organisation functions very rationally and everything is strongly linked with the shared strategy and targets.

The size of the organisation network, competitiveness and field of the business all contribute to the employees' high tendency to avoid risks and strictly monitor and follow rules and regulations. These are the usual characteristics of a process-oriented culture by Hofstede and similar features are also portrayed in Schneider's controlling culture, where certainty, predictability and safety are the key elements. However, this contradicts with the results-oriented culture stated above, in which organisations are supposedly more prone to risk-taking, whereas in Company X's case that is exactly the opposite. This is an excellent example of how cultures are not simple to define using one model, and they may very well contain conflicting attributes.

Company X is also somewhat communitarian organisation (by Trompenaars & Hampden-Turner) as its employees share a special bond and social connection, which creates meaning and purpose for them; the employees of the organisation feel being part of something big and they work hard to get there. Employees place a strong level of trust between one another; everyone takes responsibility for their own work and personal development within the company, each individual person's roles are broad and many are doing multiple projects at the same time. They work hard and support each other which creates a sense of community. Feedback and innovation is encouraged both upwards and downwards, however, as the underlying culture is still somewhat bureaucratic, the truth is that lower levels' feedback is sometimes not reaching the attention of the top levels.

How does Company X's culture support change? The change pace is quite exhausting and sometimes it might feel like transformation projects are done just for the sake of change. The Finnish case company is smaller than in most other countries, which enables it to be more agile towards change. However, being a part of an enormous network, no change for example of an IT system or process can be introduced without the pre-approval of the network, which does bring some hindrances and heavy administration to the table. Participation in planning and introducing change projects is mostly limited to the upper levels, and the

people performing the work relating to the change, have a very little say in it. Change and innovation is supported, but not everyone is part of it. Sales culture change is discussed in section 3 of this report, but the next paragraph digs deep into the different theories of culture change and its challenges.

2.4 Organisational culture change

After taking a look into the few most common models for determining organisational cultures, it is time to move on to the theories that support change management. Hofstede et al. (2010, 375) claim that “although culture is a “soft” characteristic, changing it calls for “hard” measures”. The key for understanding cultural change is to appreciate that culture is a set of rules and methods evolved by the organisation to deal with the regular problems encountered (Trompenaars & Hampden-Turner 2020). Culture has been widely recognised to be driven by emotional aspects; cultures tell their members who they are, how to behave and how to feel good about themselves, which is why changing culture can be a distressing matter to advance as it usually causes anxiety in the organisation. (Katzenbach et al. 2018; Schein & Schein 2016, 23-27.)

Cultures are prone to naturally resist change, however, organisations can be pushed towards changes either big or small by all types of cultural, environment or internal reasons (Hofstede et al. 2010, 477; Lewis 2011). The need for organisational change usually stems from a business problem that needs to be fixed, but such factors as the business environment, competition or advances in technology might require companies to change (Schein & Schein 2016, 255-256.) The traditional change management measures can be useful for redirecting some aspects of an organisation, such as planning communications during a troubling financial situation or reorganising incentives due to a new strategy, however, emotional strategy is an entirely different playfield where rational measures are not likely to work in the long run (Katzenbach et al. 2018).

It is important to remember the fact that the key in changing an organisation's culture is employees' genuine emotional engagement, which is required for the change to become rooted in the company culture. As already mentioned, the first step is to locate and comprehend the cultural DNA of the organisation and change

some of that, since long-lasting change will not happen with methods that merely scratch the surface. (Katzenbach et al. 2018; Schein & Schein 2016, 23-27.) Successful change takes time and patience, as well as repetition and agility, which is why careful planning and utilising the different models available for identifying the current culture and its core aspects is essential. Only after a thorough background work should a change project commence, since change for the sake of change is useless.

Groysberg et al (2018) state rather harshly that “culture eats strategy for breakfast”. What it means is that the best leaders are able to tell what their organisation’s key cultural characteristics are and can sense when change is needed. However, there are also many organisations where this aspect is not given much thought; the area in most cases is either completely unmanaged or for example delegated to Human Resources (hereinafter as HR). Such leaders might have formulated excellent strategic plans, which sadly usually go wrong as the leadership has failed to understand their culture’s dynamics. (Groysberg et al 2018.)

In the following chapters change theories in terms of organisational cultural change by Cameron and Green, by Groysberg et al as well as Trompenaars & Hampden-Turner are presented, followed by a summary of possible pitfalls related to culture change.

2.4.1 Culture change through nine themes

Cameron and Green (2012, 338-341) suggest that a set of nine themes is required for changing an organisation’s culture; these themes presented in Figure 7 help leadership to address the issues during cultural change.

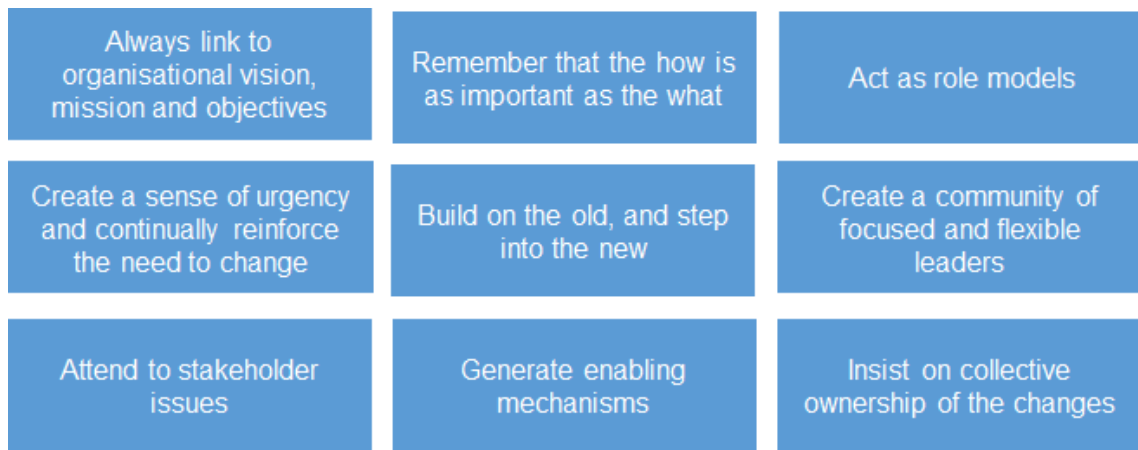


FIGURE 7. Themes for culture change (Cameron & Green 2012, 338-341).

Always link to organisational vision, mission and objectives

Organisations should only start cultural change once the current culture does not support reaching strategic goals. Business strategy is the starting point in determining which areas need improvement. It also is essential to ensure that there is a clear vision and a real need for change, as employees need to be convinced of the proposed change and understand the logic behind it, rather than trying to force change. When people are convinced that the change is good, they are drawn towards the unified vision. (Cameron & Green 2012, 338.)

Create a sense of urgency and continually reinforce the need to change

Cameron and Green (2012, 339) suggest that introducing a new internal or external element, such as a new Chief Executive Officer (hereinafter as CEO) with restructuring ideas will confuse an organisation's current day to day activities, which results in creating a good push towards making change happen. This is based on Virginia Satir's model in which an organisation needs to undergo change after something new enters and starts to rock the boat (Cameron & Green 2012, 40, 339).

Attend to stakeholder issues

Stakeholders are the heart of the transformation, which is why they need to be taken into account: the leadership should put themselves into the shareholders's shoes and involve them as much as possible. No matter if the change is proposed for positive or negative reasons, the change project's success lies on the employee engagement. (Cameron & Green 2012, 339.) Already during the planning

phase, it is important to involve all related parties to the discussion; when everyone feels like their opinions and ideas are valued and taken into account, they are more likely to welcome and advance the change.

Remember that the how is as important as the what

According to Cameron & Green (2012, 339), “if your organization has a set of core values, and of course it does explicitly or implicitly, then you need to manage the cultural change in line with these values”. Thus, integrity in culture change is important – if leadership does not keep their promises, employees are not fully engaged in advancing the change (Cameron & Green 2012, 339). What this means is that if you say one thing and do another, you are very likely to fail – leading by example and behaving as opposed to what was promised, indeed have a surprisingly big impact on how change is embraced and accepted.

Build on the old, and step into the new

Whenever a new way of doing things is needed, it is important to not to try and change everything, as there probably are strengths that should be retained and built on. In this step, creativity and actually getting things done are essential. Planning needs to be left behind and get the desired change ongoing. (Cameron & Green 2012, 339-340.) This point presumably is a noticeable issue in many of the companies today, since change is quick and constant: new tools, methods and technologies are introduced in a fast pace, and in addition to that, all other internal or external factors (like Covid-19 pandemic) may impose companies to quickly adapt to a completely new world of working. This is why this step is difficult to pay enough attention to and ensure that the change pace does not overwhelm employees and all other related parties.

Generate enabling mechanisms

“It is important to generate enabling mechanisms such as reward systems and planning and performance management systems that support the objectives and preferred behaviours of the new culture” (Cameron & Green 2012, 340). In other words, leaders should ensure that employees understand the goals linked with organisational goals and follow them. Again, employees are more likely to support change when they know what is needed from them to support the change and how their performance is measured and rewarded.

Act as role models

Cameron & Green (2012, 340) assert that employees need support and guidance especially in the beginning of the change and that is why role models should be appointed; the role models assist employees through the difficult stages of forming the new ways of working and thinking. Coaches or supervisors positively leading the way and supporting their peers is an example of a method utilised by many of the companies for this purpose.

Create a community of focused and flexible leaders

Leaders have a central role in change, as employees not only want clear, strong and focused change leadership, but they also need flexibility and quick reacting in the case that plans do not go accordingly (Cameron & Green 2012, 340-341). Smaller companies are more likely to be more agile in terms of changing direction if a barrier occurs during the transformation project, however, with careful planning and preparing towards potential risks, even the bigger companies ought to be able to reroute their way whenever encountering issues.

Insist on collective ownership of the changes

There are many cases in which the HR department has been made in charge of cultural change, while the CEO together with the senior management takes charge of the strategic change. This is not a solid plan, since it will result in leadership becoming disconnected from the cultural issues and not being able to act as role models for the rest anymore. It will also lead to increased change resistance among employees. (Cameron & Green 2012, 341).

2.4.2 Four levers for evolving a culture

Groysberg et al (2018) summarise in their Harvard Business Review -article that there are four practices that lead to successful cultural change: 1) articulate the aspiration, 2) select and develop leaders who align with the target culture, 3) use organisational conversations about culture to underscore the importance of change, and 4) reinforce the desired change through organisational design.

The first lever, articulating the aspiration, highlights the importance of planning, as also noted in the model by Cameron and Green, but also points out how essential it is to focus on the next steps as well. Groysberg et al (2018) refer to the fact that creating a new culture should always begin by analysing the current as the first step. The analysis should be done by using a framework that can be openly shared within the company. Additionally, management ought to understand the outcomes of the culture and how it aligns with current and future market and overall conditions. It is a good idea to frame the change to the current business-related challenges and opportunities, but also to aspirations and upcoming trends. (Groysberg et al 2018.)

Secondly, leaders in line with the target culture should be chosen, as they are important role models for others. Leaders who are unsupportive can be re-energised to the important change management role through training and education. It is important to note that cultural change can lead to turnover. As the third point, the importance of discussion around change should be highlighted. Employees observe and share their experiences on how leaders act and once they recognise new behavioural models, they will start acting differently as well. This creates a loop of positive feedback. Social media discussion and having change champions are a few good examples of this. (Kotter 2012, 166; Groysberg et al 2018.)

Lastly, Groysberg et al (2018) points out that “when a company’s structures, systems, and processes are aligned and support the aspirational culture and strategy, instigating new culture styles and behaviors will become far easier”. Performance management, as an example, can be used to support and encourage employees and with training target culture can be consolidated. (Kotter 2012, 166; Groysberg et al 2018.) What this means is that introducing a new method and expecting everyone to take it in is not merely enough – company’s structures, approval processes and rewarding measures are a few examples of what might also need to be altered to support the change in a more comprehensive way.

2.4.3 Framework for managing culture change

Trompenaars & Hampden-Turner (2020) claim that most culture change models can be criticised for two reasons: they underestimate the difficulty involved in achieving as well as sustaining change, and secondly, they cast aside the current situation in favor of a new future, thus getting rid of the best that already existed. This is why the two authors instead suggest an alternative approach to change, which in practice investigates the current corporate culture, as perceived by the employees, and contrasts it with what each would consider to be the ideal culture. In this framework it is important for the leaders to note that change should not go from one extreme value to another, but instead develop a new business mission which is compatible with the existing culture. (Trompenaars & Hampden-Turner 2020.) Figure 8 presents the framework in a simple and understandable flow chart format.

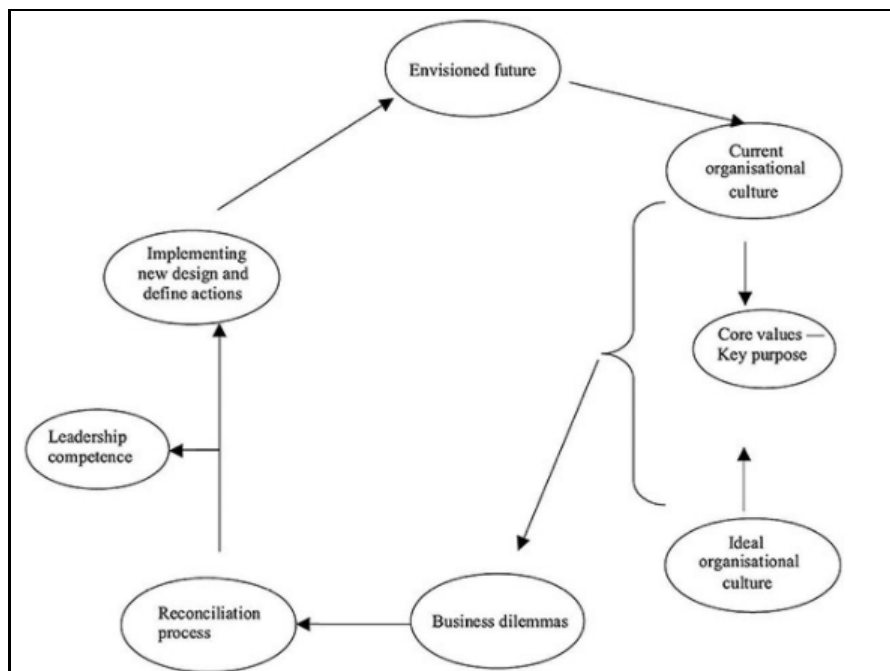


FIGURE 8. Framework for managing change (Trompenaars & Hampden-Turner 2020).

In practice, the model by Trompenaars & Hampden-Turner (2020) identifies that there are eight steps that should be utilised when planning a change intervention. The steps were created to ensure that the management carefully considers the basic dilemmas they need to resolve to make their current business into the desired one, and as one might recall from section 2.3.3. of this thesis, Trompenaars

and Hampden-Turner (2020) established that cultures need to be evaluated based on their way of choosing solutions to problems. Therefore, the fifth step of their list, as shown below, is one of the most crucial ones:

1. creating an envisioned future,
2. investigating the current corporate culture with the cross-cultural profiler, hereinafter as CCP,
3. identifying core values and key purpose,
4. defining the ideal corporate culture with CCP,
- 5. defining major business dilemmas caused by the tensions between envisioned future and key purpose and between current and ideal corporate cultures,**
6. reconciling four or five major business dilemmas,
7. investigating the current leadership competence, and
8. implementing new design and concrete action points. (Trompenaars & Hampden-Turner 2020.)

What was interesting about this model, called “new framework” by Trompenaars and Hampden-Turner, was its approach and methods. They argue that the traditional change processes almost without exceptions always require a change in behaviour or values from one to the other, while in their model the integration is smoother and resistance to change can be broken as the current values can be retained and developed. In short: “it is a process of enriching values through change rather than replacing one value or behavior with another” (Trompenaars & Hampden-Turner 2020). This sounds almost too good to be true, yet quite intelligible at the same time.

2.4.4 Potential pitfalls of culture change

Culture change is a challenge, which can be defeated or at least encountered with a thorough risk analysis, which considers the potential and most plausible difficulties. In this chapter, the most common ones are presented. Schein and Schein (2016, 338) state that “one of the biggest mistakes that leaders make when they undertake change initiatives is to be vague about their change goals and to assume that “culture change” would be needed”. Another big yet common

pitfall is the leader's inability to sell the change vision to those who are operationally responsible in the grass root level for pulling it off: cooperation can be gained when change is viewed as necessary and appropriate (Lewis 2011).

According to Kotter (2012, 88-89), the change vision needs to be carefully established and if done so, there are two steps of communication that usually define how the organisation will succeed with the change; first is the urgency rate of the change, which should be high enough or the audience will be lost right at the beginning, and secondly, the group guiding the transformation should be carefully chosen to ensure that appropriate communication is created. In addition to this, it is often noticed that during culture change it is common for the new symbols, such as a new logo, name or slogans to receive the most attention. They are easily visible, yet play only the most superficial part of culture: without any fundamental changes in the culture's deeper levels, values and rituals, it will all just wear off very quickly. (Hofstede et al. 2010, 376.) This is why the current culture's characteristics, strategy, vision, objectives and so forth would need to strictly walk hand in hand with the organisational change.

As stated above, communication is one of the key methods in successful organisational change. Lewis (2011) asserts that "communication is key in triggering all change" and it is extremely important to practice clear communication, partly because it can be very difficult to do and if performed carelessly, can stir the pot and merely confuse all related parties. However, one should be careful not to think that communication in change is everything; change consists of multiple resources, meaning that when something fails, communicative methods are often at an important role in helping to mediate them. (Lewis 2011.) The most common trap is to either under- or overcommunicate or to send inconsistent messages, which will most likely result in failures (Kotter 2012, 87).

Secondly, it is important for the employees to experience success and see the results. If employees detect that the new way of working pays off by for instance increasing efficiency or customer satisfaction, it is natural for them to internalise it quicker. Leaders can communicate new vision, goals and means, introduce new rewarding and control systems, however, none of those make culture change happen unless people become satisfied and start sharing experiences with each

other. (Kotter 2012, 166; Schein & Schein 2016, 338-339.) People are the key during change and their thoughts and concerns as well as suggestions for improvement should be put attention to and taken seriously, if hoping to succeed.

When trying to unlearn some cultural aspects like developed and comfortable routines or processes employees have become used to, it can often be experienced as psychologically challenging. Employees might think that the old way was better and that it is not worth the trouble to start for example learning a new tool from scratch. In order for change leaders to prepare for this challenge, it is smart to reserve time for employees to first unlearn the old before bringing in the new. (Schein & Schein 2016, 339.) The dilemma is to try being agile and to move quickly to keep up with competition and technological advancements, but not too fast at the same time. If an organisation is too eager to change everything, it might just result in people falling back into old patterns and resisting change.

Lastly, Schein and Schein (2016, 339) argue that "as task complexity and systemic interdependency increases, change becomes perpetual". This is common in many organisations today, as technology is increasingly complex and organisations are culturally very diverse. New behaviour is introduced, which brings up completely new reactions from the surrounding environment, and which in its turn again creates disappointment, anxiety and starts to spark motivation to start other change projects. It can very easily become an endless circle. (Schein & Schein 2016, 339.) Korpimies (2020) investigates in her change leadership article how constant change is part of the business today; the biggest issue is to try to change too many matters at the same time – if the leaders fail to prioritize the different changes, every employee will take it upon themselves to decide what they start adopting. That sounds like the start of an absolute chaos.

3 SALES MANAGEMENT

This chapter examines the theoretical framework in terms of sales management. First, a definition of sales management is presented, which is followed by a few examples of processes for managing sales, as well as the topic of customer relationship management. The last part of this chapter covers the aspects of sales management culture, which links the organisational culture theory represented in the previous chapter together with the sales management outlined in this part of the report.

It is worthwhile to mention that when referring to the case company, the term “sales and client leadership” is used in this report in replacement of sales management. The reason is that the sales and client leadership -term is utilised in Company X’s strategy. In this chapter, however, the term sales management is utilised due to its use in the literary references. Both terms, however, refer to the same topic.

3.1 Definition of sales and sales management

In order to understand the complexity of sales management, it is essential to first grasp the idea of sales. Dixon and Tanner (2012) define sales as “the phenomenon of human-driven interaction between and within individuals/organizations in order to bring about economic exchange within a value-creation context.” Sales management, on the other hand, is a management task which comprises leading, coordinating and supporting a company’s sales activities; it is a strategy for sales and organising sales operations in line with the vision and strategy of the company (Parravicini 2015).

Sales management is a process in which teams, operations and techniques are coordinated and strategies developed and analysed, in order to assist organisations to reach and beat sales targets. Strategic management of sales is a must in all revenue making businesses. Also, if companies are willing to successfully manage their sales processes, sales technology and tools are needed – this is more commonly referred to as customer relationship management, CRM, which is further explained in the following subchapter. (Pipedrive n.d.)

According to Baker (2020), a sales management process covers four main components: people, strategy, activity and reporting. People highlight the fact that a sales team is only as good as their manager, which is why a solid and well-trained sales personnel is needed. Sales team should also be aware of the strategy and vision, which is shared and managed by team managers. In addition to that, managers are in an important role in supervising the team's efforts; winnings are celebrated and losses are turned to good learning points together as a team. The last step, reporting, means systematic and timely reporting and analysing of sales activities. This area helps find out such crucial information as for example win rates and average sales cycles for future projections. (Baker 2020; Junkkari 2020.)

3.2 Customer relationship management (CRM)

Customer relationship management, or CRM, can be referred to as the primary tool that links the customer with the organisation's sales department. CRM provides an organised platform where current and prospective client relationships can be managed. It is the value that organisations place on the relationship between their business and customers, and it does not matter whether the organisation is product or service driven, but the whole business process must be involved. (Anderson & Kerr 2002; Santos 2019, 132.)

The goal is to help store and share information across different departments in an organisation in order to bring out the best customer experience. CRM implementation can not only assist in providing a better understanding of customer behavior, but also on their significance to the business. (Santos 2019, 132.) What the CRM tools do is they bring value to the organisation; they assist the sales team and management in tracking and reporting sales opportunities and milestones, having an overall structured view of what is to come and the potential revenue they bring, and also for example measuring conversion rates step by step (James & Martini 2012, 121; Pipedrive n.d.; Weinberg 2015, 22). When the use of CRM is carefully planned and trained to the employees, as well as timely monitored, it is easy to see what kind of benefits it can bring to the company.

However, the importance of the efforts before, during and after the CRM implementation still needs to be highlighted, as the company is more likely to be headed to a very bumpy road if they are not paid enough attention to.

There are three components, according to Santos (2019, 133), to which CRM can be categorised into: customer service, campaign management and salesforce automation. Customer service is the customers' first point of contact and every step of the way is recorded and saved to a CRM tool. Campaign management is then used by the marketing team for attracting new customers and CRM is again used for recording the deals, customer responses and analysis methods utilised during the campaign. Lastly, salesforce automation increases efficiency and helps to avoid duplications, as CRM increases transparency. (Santos 2019, 133-135.)

When a company is considering moving towards a customer relationship format, there are three aspects to pay special attention to, which are retention, developing customer potential and lastly, de-selecting customers. Customer retention can be difficult due to increased competition and the average annual rate for companies to lose customers can be as high as between 15-50 per cent, which is why there is a lot of pressure to keep the current customers satisfied. The second point, developing customer potential, is to think how to turn the one-time customers into regulars. The third and controversial element is de-selection of customers; or in other words, starting to lose the customers that do not offer long-term value in the future. (Anderson & Kerr 2002.) De-selection of customers can be a difficult point to cover, however it could later not only result in better overall results for the company while being able to fully commit to a limited scope of clients and leaving the unprofitable ones out. In addition to that, considering to de-select one's customers could potentially help the sales team's resourcing and workload issues as well.

In regards to creating a CRM tool in an organisation, Roberts-Phelps (2001, 4) suggests the following four step scheme:

1. segmentation,
2. analysing current behaviour,
3. developing strategy to achieve target, and

4. behaviour maintenance.

In the beginning of the process, the organisation should investigate and analyse the current data; all the systems, information, marketing knowledge and so on. In the second step, customers are segmented by value and potential value as well as previous behaviour, which is then compared with patterns and behaviour of what it is targeted for the future. This is followed by strategy development and investigating the actual technology available to achieve the anticipated level of relationship management. In the final stage, the findings are measured and thoroughly tested to ensure that the methods will work on a bigger scale. (Roberts-Phelps 2001, 4-6.)

James & Martini (2012, 123) assert that “the key to effective sales management through sales process is combining the underlying skills with the process.” When sales managers take it upon themselves to ensure that their sales team is equipped to work, manage and finalise sales with the help of the tools in use, the sales representative is ready to succeed (James & Martini 2012, 123). This is why leadership ought to arrange regular training and support for their team, and also ensure the sales team members support their peers as well, instead of heavily competing and working against each other. Lastly, ensuring the discussion and feedback constantly flows easily from top-down and back up makes sales employees more committed to the work and the company.

3.2.1 Potential challenges of CRM

It is good to understand that introducing customer relationship tools will not bring a solution to all the problems: the use has to be carefully planned and monitored within the organisation. Weinberg (2015, 28) examines this with the question: “is your CRM working for you or are you working for it?”. There are many cases in which companies go under the latter category, which can create issues. If sales managers and personnel start focusing more on merely timely recording their sales opportunities in the CRM tool instead of doing the actual work, the organisation is fast forwarding to the undesired direction. (Weinberg 2015, 25-28.)

The traditional way of perceiving a sales process was that sales professionals do something for the customer, however in today's technology and vendor-driven world the emphasis is on doing something to the customer. This is supported by the fact that the original technology for selling was called SFA, which is short for Sales Force Automation, whereas today it is called CRM, or Customer Relationship Management. Name is different, but the concept is the same: applying factory type automation to the sales environment. The emphasis turned to standardising sales processes, which CRM helps to monitor. (James & Martini 2012, 121-124.) If organisations fail to change their old mindsets in regards to attending to their customers, it is tough for them to win new clients and retain the old ones. Customers are knowledgeable and can be quick to change the service provider if they do not feel valued.

The General Data Protection Regulation, or hereinafter as GDPR, which came forth in 2018, was a serious wake up call for many companies as they had to start paying real attention to the condition of their current client register (Holopainen, 2019). One of the obvious challenges with a CRM is to ensure the data there is up to date. In other words this means to encourage and ensure the employees record their sales activities in the database instead of falling back into the old customs of keeping a database in everyone's own emails. Quality CRM data is extremely helpful for the entire company, but also helps the organisation to avoid any GDPR related issues if carefully taken care of.

3.3 Creating and managing a sales culture

There are many strategies and methods for organisations to uncover and put to use when it comes to sales cultures. Some researchers claim that the key issues are mainly caused by the lack of training arranged for the sales employees, whilst others see the main issue within leadership behaviour instead. However, what can be agreed on is that there are multiple factors which either directly or indirectly have an impact on sales culture.

Weinberg (2015, 5) declares that "Organizations don't change from the bottom by improving the skills, techniques, and attitudes of their salespeople. To truly transform the results and health of an entire sales team, the leader and the culture

must be transformed.” This is why it is extremely common that the sales issues are not caused by the sales team, but instead it actually stems from the company culture and how they are led. (Weinberg 2015, 8-13.) James and Martini (2012, 124) on the other hand, state that creating an organisational culture that encourages creativity is essential for the purpose of establishing a sales culture. This is due to the fact that selling is consultative and customer-focused and therefore requires a level of creativity; a day in sales can for instance include building solutions, finding even better ways to serve customers and solving different organisational issues (James and Martini (2012, 124).

In a sustainable and productive sales culture, the focus is on goals and results: the sales team needs to understand what is expected of them, under what grounds are they evaluated and what processes there are for monitoring achievements (Weinberg 2015, 8-13). The sales process needs to be depicted in a clear and concise manner, which is essential for sales people to succeed in their work. This not only includes a concrete sales process description, but also clear numeric goals and information on how performance is measured, as well as tools and processes that are effortless to use. The sales process should be created in collaboration with the sales team, as if they feel left out of the planning or feel like the process is not useful, they are not likely to adopt it to use. (Junkkari 2020; Tracy 2015.) Like mentioned earlier, involving the team members and maintaining a stream of clear and open two-way communication is key; hearing what employees have to say in terms of goals and performance measurement lead to better involvement.

Tracy (2015) points out that the top leadership plays a big role in sales performance and that there are two qualities that good bosses entail: clarity and consideration to the individuals in your team. In terms of clarity, Tracy (2015) says that “in my experience, clarity is 95 percent of success, not only in business and sales, but in life.” Leaders need to consider the management style viable for the purpose and team. One method is telling, which in other words, is being more directive and hands-on, while a selling style is where the leader encourages and persuades the sales team by telling them what they should do and why. Third method of management is for experienced employees who need little guidance, and the last one is motivating, in which the leader creates incentives to make

employees perform at the highest level. (Tracy 2015.) There are of course many ways to lead and support one's sales team and it can be difficult in the beginning to find what is the right choice for a specific group of people, as everyone is individual. However, listening to the team, and deciding the best suitable methods together might just be the key to success.

In relation to clarity and openness of management, Weinberg (2015, 127) lists that sales managers' three key tasks include: conducting one-on-one meetings with sales personnel, leading team meetings, and lastly, working alongside the sales team by observing and coaching. All the above mentioned tasks contribute to improving the organisation's sales culture, leading methods, managing the team as well as the sales process: they assist team managers to get an idea on the sales team's activities and whether there is some training or coaching required to be able to perform even better. The meetings held together with the entire sales team are critical for building a winning culture, since they foster competition, elaborate vision, enable sharing of best practices, challenges the team and not only builds trust and relationships among the team members, but also connects the team in a completely new way. (Weinberg 2015, 128-154.)

James and Martini (2012, 115-126) add that building an effective sales team not only consists of scientific hiring, training and coaching, but also of effective use of sales technology and building a culture of innovation and creative leadership. Consultative and customer-focused methods encourage and increase problem-solving skills, team work and bring out new means that the sales employees can serve their customers. It can be challenging for the organisations to find the right employees for the job: the employees who trust and support the leadership, are well equipped to do the work, know how to utilise the CRM tools and have an upward career path are more likely to stay in the company for long time. (James & Martini 2012, 115-126).

After taking a look at the theory behind sales management and creating a sales culture, it is crucial to point out how enormous change was experienced in 2020-2021 (when this thesis was conducted) due to the spread of the Covid-19 pandemic. Many companies needed to quickly transform from face-to-face sales meetings to online, regardless of having the technical requirements set up and

prepared for it, or not. Sales operations faced deep challenges; since spending had significantly decreased, it inevitably also had an impact on the case company. The pandemic at the time of this research was still quite a new external factor, but it is interesting to see what the future will look like for sales and sales management.

4 RESEARCH METHODS AND METHODOLOGY

This chapter describes the research methods and methodology, as well as the process used while conducting this study, followed by data analytics and the aspect of research ethics. A case study approach and both qualitative and quantitative methods were chosen for the purpose of this thesis. These are explained in detail in the following subchapters and the full research methods process is briefly illustrated in the Figure 9 below.

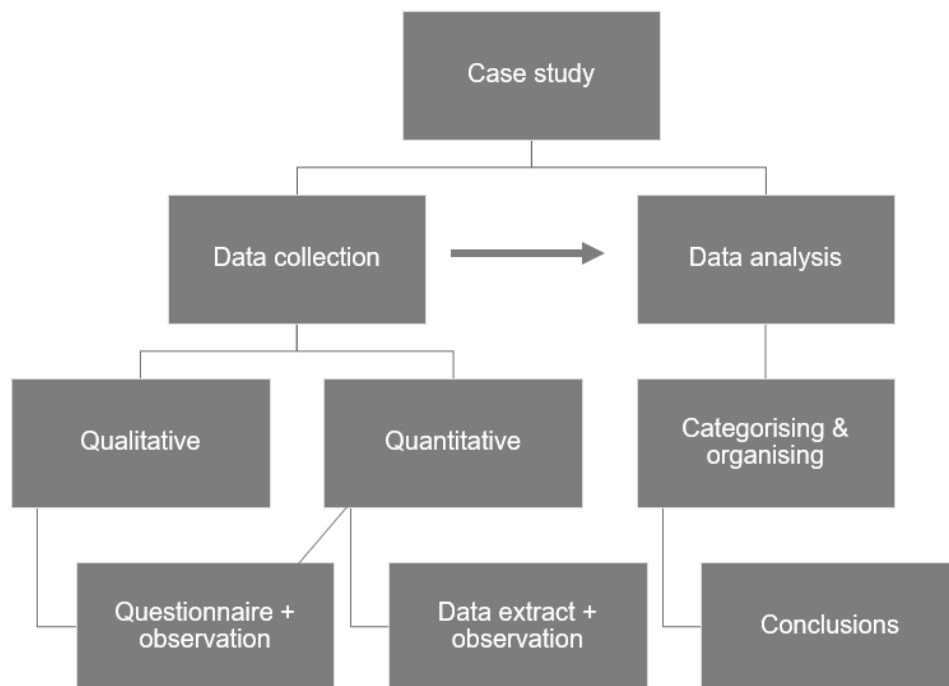


FIGURE 9. The research methods and process of this thesis.

4.1 Research methods

As depicted in Figure 9 this research was conducted as a case study and with a mix of qualitative and quantitative methods. Since case study has proven to be useful for finding out the narrative behind the results and providing context to outcome data, it is the approach chosen for this research (Neale, Thapa & Boyce 2006, 4).

Case study method is not only useful when investigating a certain phenomenon and hoping to gain insight on what happens in a given situation, but also for pinpointing the reasons behind a project's success, or what were the challenges and

difficulties behind it (Farquhar 2012; Neale et al. 2006, 3). Simons (2009, 21) also states that “Case study is an in-depth exploration from multiple perspectives of the complexity and uniqueness of a particular project, policy, institution, program or system in a ‘real life’ context.”

According to Farquhar (2012) there are three different case study designs: single-case, multiple-case and embedded-research design. The single-case model simply focuses on one case, whereas the multiple-case design has a more broad focus as it is used mainly for comparing and contrasting multiple cases and phenomena at the same time. For this study the embedded case study was chosen, as it allows in-depth research across organisational units and assists in generating subtle yet rich data that characterises case study research. (Farquhar 2012.) Due to the size and structure of the case company and since the focus of this study was the organisational culture change in the aspect of sales and client leadership, the embedded approach was found most suitable. The key is one case in which multiple research questions are analysed.

The key advantage of case study is that it gives much more detailed information than other methods can provide and it also allows to demonstrate the complete story through data collected by using multiple methods. However, most common difficulties faced with a case study method are the length, lack of rigor and not being generalizable. Case study is a thorough method with much detailed information, so one should be careful not to make it too detailed and secondly, case studies have been seen as less rigorous than other methods as there is a risk of bias in findings. This is why it is essential to ensure validity and reliability while conducting the study. The last most common pitfall is not being able to generalize one case from another. However, case studies can also be prone to overgeneralization, which can happen after a few examples are chosen and after that the researcher assumes without evidence that they are typical of the population. (Farquhar 2012; Neale et al. 2006, 4.)

4.2 Data collection methods

Case studies rely on various methods and sources of information to provide as complete a picture as possible (Neale et al. 2006, 7). According to Farquhar (2012) “the strength of case study research is its capability of studying a research question or problem in depth and in context, therefore the data collection procedures should overall complement this characteristic.” Case study research is often considered a research strategy that consists of qualitative data, however, various data collection methods can be utilised in it. There are three suitable data collection methods for case study research: survey, observation and interview, all of which can be used quantitatively or qualitatively. (Farquhar 2012.) In this research the following methods were utilised: a collection and analysis of data through an employee questionnaire and a comparison of two ERP sales data extracts, as well as observation.

When using quantitative methods, numerical data is generated and utilised, and when measuring quantitative data, it is first essential to identify the key attributes and after that, those are measured against numeric values. Qualitative methods instead use non-numerical data and methods, such as interviews. Qualitative data is more suitable for in-depth investigations. (Farquhar 2012; Saunders, Thornhill & Lewis 2019, 175.)

Case studies typically combine primary and secondary sources of data, which consist of both qualitative and quantitative data, as indicated in Figure 10. Primary data is new data that has been collected specifically for the research project and the goal is to find new information in terms of the research question, whereas secondary data can consist of existing materials from internal or external data sources. Primary data techniques are surveys, interviews and observation, each of which can lead to qualitative and quantitative data collection. While secondary data sources can for example be meeting minutes, internal reports or external statistics. (Farquhar 2012.) This research utilises primary sources and both qualitative and quantitative data, which are further described in the following subchapters.

Data	Qualitative data sources	Quantitative data sources
Primary	interviews (face to face, phone, online) focus groups, participant observation, diaries	survey, observation, experiment
Secondary	minutes of meetings, internal reports, consultancy reports, market research reports, government and EU data	spreadsheets, graphs, annual reports, external statistics, panel data, UK and EU data

FIGURE 10. Qualitative and quantitative data sources for case study research (Farquhar 2012).

4.2.1 Questionnaire

Questionnaires can be useful when wanting to gather data from 20+ people and knowing the respondee scope and the questions are straightforward. Most commonly used and effective way is to use a self-administered online questionnaire. (Farquhar 2012.) For this study, primary data was collected through an online questionnaire using Google Forms. The questionnaire was designed to provide both qualitative and quantitative data on the matter at hand, which is why the online question pattern consisted of both open and closed questions.

When planning the use of a questionnaire as part of the data collection, sufficient amount of time should be left for preparation. When designing a questionnaire, the researcher should carefully consider who will be able to provide the information needed (sampling), whether the questions really answer to the dedicated research question and in order to get the right kind of data, one should at least consider testing the survey beforehand. (Farquhar 2012.)

According to Easterby-Smith, Thorpe and Jackson (2008) “the aim of rigorous sampling is to achieve representativeness and precision”. The scope of the questionnaire was limited to Salesforce license holders, a total of approximately 600 persons working in the case company in different roles and departments. Employees without a Salesforce license were left out of the scope due to the fact that recording sales activities in the CRM tool was not part of their jobs.

The requestees were asked to answer to statements on a Likert scale of 1 to 5 (1=strongly disagree, 5=strongly agree), followed by open questions to prompt

requestees to give more insight to their answers. Likert scale was chosen as it is especially useful for mapping opinions. (Aaltola & Valli 2018.) The questions were structured keeping in mind the research question and theoretical framework and thus, divided into two main categories; sales culture and transformation, and sales activities and opportunities. The questions are attached to this report in Appendix 1.

To avoid misunderstandings in terms of the question formats and wording, the questionnaire was tested by a few employees in advance. This is highly supported by Farquhar (2012), who states that researcher has only one opportunity to collect the data, which is why he advises “to test your instrument, first in a pre-test with informed colleagues and then through a pilot with a small sample of the population of interest.” This allows to check that the questions are easily understandable, bring out needed answers and indicate a good response rate and does not take too long to complete. (Farquhar 2012.) After the successful testing of the questionnaire, the questionnaire was finalised and sent out. The respondents were given two weeks to answer to it.

4.2.2 Data extract

Stewart & Kamins (1993, 3) assert that “an investigation of secondary sources provides an opportunity to learn what is already known, and what remains to be learned, about a particular topic”. To reach conclusions, researchers often combine and use several sources to reach conclusions not suggested by any one source (Stewart & Kamins 1993, 3). In this study two extracts of sales activity data was run from the ERP system to gain insight on the sales and client leadership change in the case company. The collected data is secondary and of quantitative nature.

The data was extracted from the previous and current ERP systems in two separate sections to be able to compare as well as summarise findings. This was completed in order to point out whether the case company’s sales culture and employee behaviour had shown change so far and whether the change project was on the right track towards a long-lasting organisational culture transfor-

mation. Stewart & Kamins (1994, 5) support the use of secondary data as a comparative tool since it can be very useful in examining differences or trends in between data.

The first sample data was extracted of the period April-October 2019 and compared with another extract from April-October 2020. The data related to sales activities of 2019 was taken out from the previous ERP system, while the newer set of comparison data was run from the new CRM software, Salesforce. The comparability of the data was carefully considered beforehand since in the previous ERP only the won sales activities were registered, however, in Salesforce not only all activities regardless of being won or lost, but also sales meetings and leads were logged in the system. Therefore, there would be an evident increase in the registered sales activities when comparing the data between the two different ERP systems.

The coronavirus Covid-19's impact on sales was also taken into account in this research: instead of researching whether Salesforce has increased sales in the case company, the increase in the amount of registered activities and change in the behaviour was investigated. The change in employee behaviour was determined in terms of who were registering the activities and sales contacts in Salesforce (license holders or administrative), as opposed to the previous ERP.

4.2.3 Observation

Since the author of this report was working at the case company while conducting the study, it should be mentioned that observation has in one way or another impacted this report (even though not used as a primary method). According to Simons (2009, 55) "observation is present throughout the whole research process from the moment you enter the field until you leave." By observing researchers can find norms and values that are part of an organisation's culture or sub-culture, and observations can also be of assistance in cross-checking as well as strengthening the validity of the data obtained through the research (Simons 2009, 55).

In spite of the author not having a direct link with the transformation project studied in this research, it is important to understand that personal observation and already having a deep understanding of the case company's operations have evidently had at least an underlying impact on the way this report was constructed and how the results were interpreted. However, the author did not let her personal views affect the interpretation of the results, as it is needless to say that those should always be handled without any personal bias.

4.3 Data analysis

“The first step in any analysis is to put the data into the format that you need to carry out the procedures of measurement that you have planned”, states Farquhar (2012). The data extract from the older ERP was summarised and compared against the newer version of data. The goal was to find change in behaviour in the use of Salesforce, but also to see whether there were any regional or department-related differences in the use, or other emerging patterns to point out (Farquhar 2012).

The data received from the questionnaire was analysed with the help of coding. The responses were thoroughly investigated, summarised and categorised in themes in order to dig deep into the research topic. The results of the questionnaire helped to measure the overall success and direction of the transformation project and also, as stated by Farquhar (2012), highlight relationships between variables.

4.4 Research ethics

Ethics is not only the current behaviour but also how one should behave when interacting with people (Simons 2009, 96). Hamilton & Corbett-Whittier (2013, 64-65) assert that there are two principles that guide ethics: respect and responsibility; and ethical behaviour is built of honesty, objectivity, carefulness, safety as well as openness. In the research process this means creating a relationship with participants that respects human dignity, integrity and creates trust; or in other words “doing no harm”. It is essentially important to keep this in mind while gaining data and reporting. (Simons 2009, 96-97.)

It was decided at an early stage of this research that the case company should remain anonymous, since this study was handling confidential sales data as well as sensitive information on employee behaviour and company culture. In this study, the ethical aspects were taken into account while planning, conducting the questionnaire and also while collecting and reporting the data received. Especially when hoping to gain useful and truthful data from the questionnaire, it was ensured and also informed to the respondents that they could not be identified from the answers received. Therefore, no personal data, such as emails or names were collected in the questionnaire. The data extract did however contain personal data, and that is why that data was handled with care and not released to any party outside than the author and the representative from the commissioning party.

The scope and research question of this study were carefully discussed with the commissioning party before commencing the work to ensure that the author was on the same page with the hoped outcome of the research. Prior to releasing this report for distribution, the commissioning party reviewed it in order to ensure that no sensitive data was released. This process is also acknowledged by Hamilton & Corbett-Whittier (2013, 67), who not only suggest sending out a written proposal and gaining permission to it before any work commences, but also ensuring that both parties are in agreement with how and where the findings will be shared.

According to Hamilton & Corbett-Whittier (2013, 70) "if you have engaged in research around sensitive topics, you may need to ensure that after the research has finished, information and other resources are made available to participants." It was discussed with the commissioning party whether the summary of the results of the study would be distributed in the case company. It was evident that no responses nor any sales data from where employees would be able to identify their colleagues would be shared, however, it was decided that a summary and key findings of the study would be disseminated inside the company. This way employees were able to see that their efforts and opinions have been taken into account, and based on which the case company had drafted responses for developing the transformation project's next steps.

Since observation was used as one of the secondary research methods, it was important to ensure that no personal views and opinions would affect the research. No conclusions could be made based on the author's personal views, but instead fully based on the facts presented in the data and results. Sanger (1996, 5) states that 'we look where we expect to find rather than opening ourselves to any possibility that might turn up'. This refers to the fact that while observing, researchers should remember to not fall into the trap of simply affirming what was already known; this is why it is important to not let the previous knowledge overrule being open to recognizing the unexpected (Simons 2009, 57).

5 RESEARCH RESULTS

This chapter covers the results collected during this research using the methods described in the section. First a short description of the questionnaire details and demographics are presented, followed by a detailed demonstration of the questionnaire's key results and findings, and lastly, the findings of the data extracts are summarised. The results of both the questionnaire and data extract were analysed and cross examined, resulting in a few key themes that are analysed in the discussion -section of this thesis.

5.1 Questionnaire findings

A link to the Google Forms questionnaire was sent to approximately 600 employees (the Salesforce license holders of the case company) and 77 answers were received, giving it an answer percentage of 13 %. The results were analysed with the help of the Pivot tool in Excel. It is worthwhile to mention that since 13 % was a rather low participation rate, the results provided a framework to the momentarily situation, however not a complete picture of the progress.

There were three sections to the questionnaire: 1) demographics, 2) sales culture and transformation, and 3) sales activities and opportunities. In the demographics -section the respondents were asked to fill in a few background details considered useful for this research. These details are further examined in the next subchapter. The questions 1-7 under section "sales culture and transformation" concentrated on the aspect of culture transformation and client leadership in terms of Salesforce, while the questions 8-16 under section three were dedicated to sales activities and opportunities and the use of Salesforce. The full list of questions can be found from Appendix 1 of this report.

There were 13 questions or statements, to which the respondents were asked to answer on the Likert scale of 1 to 5 (1=strongly disagree, 2=disagree, 3=neither agree nor disagree, 4=agree, 5=strongly agree) and below each of the 13 questions, there was a non-mandatory open question -field titled "Why/why not? Please give an example" or similar to encourage the respondents to freely give their thoughts on the specific question if they wanted to. In addition to that, there

was one mandatory open question and also a few questions structured in a different manner (these are individually described in the results -section of this paragraph), which altogether made 16 questions.

5.1.1 Questionnaire demographics

Demographic questions such as gender, age, location or education, to name a few, can be used to find trends among respondents and can also help explain some of the results received (Toor 2020). For the sake of this research, the questionnaire contained the following demographic questions: role, department, office location and development goals relating to sales and client leadership. These factors were considered to best bring out any possible trends and/or distribution in the data, which would contribute to the analysis of the results.

The majority of the respondents of the questionnaire (91 %) were located in Helsinki and the rest, 9 % in regional offices. The most responses were received from the department of Helsinki's Assurance services (40 %) and Advisory (34 %), followed by Tax & Legal with 13 % and Private Company Services, hereinafter as PCS (in other words; regional offices) representing a total of 13 per cent of the responses. To put this to scale, out of the total 600 Salesforce licensees in the case company, the majority, 84 %, were at the time of the research working in Helsinki (34 % in Assurance, 29 % in Advisory and 21 % in Tax & Legal) and 16 % in regional offices in Finland (11 % in Assurance, 2 % in Advisory and 3 % in Tax & Legal). These details are demonstrated in Figure 11.

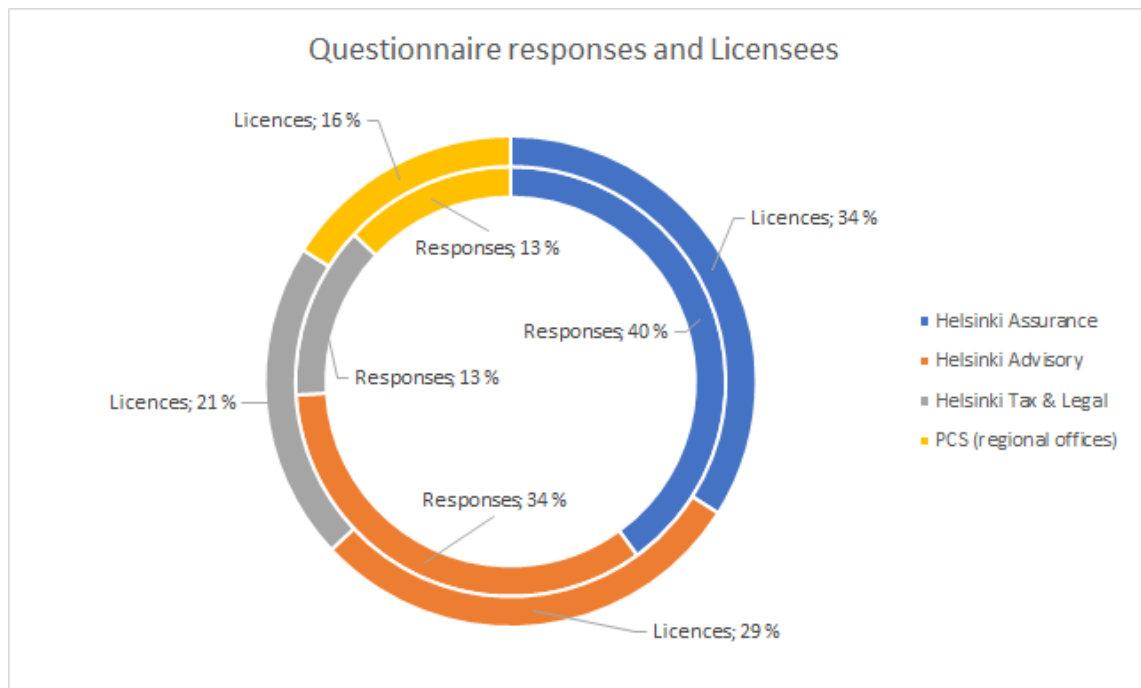


FIGURE 11. Questionnaire responses and Licensees.

One of the demographic questions focused on the respondents' roles; majority were either Managers (31 %) or Senior Managers (21 %), but there were also Directors (17 %), Senior Associates (14 %) and Partners (12 %) among answers as well as a few Associates (2 %) and other roles (3 %) in the mix. Lastly, the respondents were asked to indicate what kind of personal goals they had relating to sales and client leadership, a vast majority (91 %) seemed to be aware of them, while only 9 % stated "N/A / I am not sure". The reason why this was asked was that it has been proven by many researchers that in addition to having clear and concrete goals, employees should understand how those are linked with the organisational goals and strategy, since that helps the companies to achieve their objectives and finally, reach desired behaviour (Cameron & Green 2012, 340; Schein & Schein 2016, 338).

Since the questionnaire was answered by quite a broad spectrum of different roles and departments, the assumption was made that the results provided a reasonable view of the topic, keeping in mind the low response rate of 13 per cent. Answers were received from all of the departments and also a satisfying amount from employees outside of Helsinki, which meant that no certain group or region was over represented in the results.

5.1.2 Questionnaire results – sales culture and transformation

The questions 1-7 concentrated on the employees' motivation and possible behavioural change towards a more structured sales and client leadership culture after the new CRM tool, Salesforce, was adopted to use in the case company. The goal of this first set of questions was to, in addition to the key question (Is the case company on the right track towards successfully changing its organisational culture?), especially answer the following two research sub-questions of this thesis:

- Are the employees motivated to use Salesforce and do they support the organisational culture change?
- Is the current organisational culture, leadership and employee behaviour showing focus towards sales and client leadership since Salesforce was adopted?

A summary of the numeric results (scale 1-5) of questions 1-6 are represented in Figure 12, while the results of the open question number 7 are demonstrated at the end of this chapter.

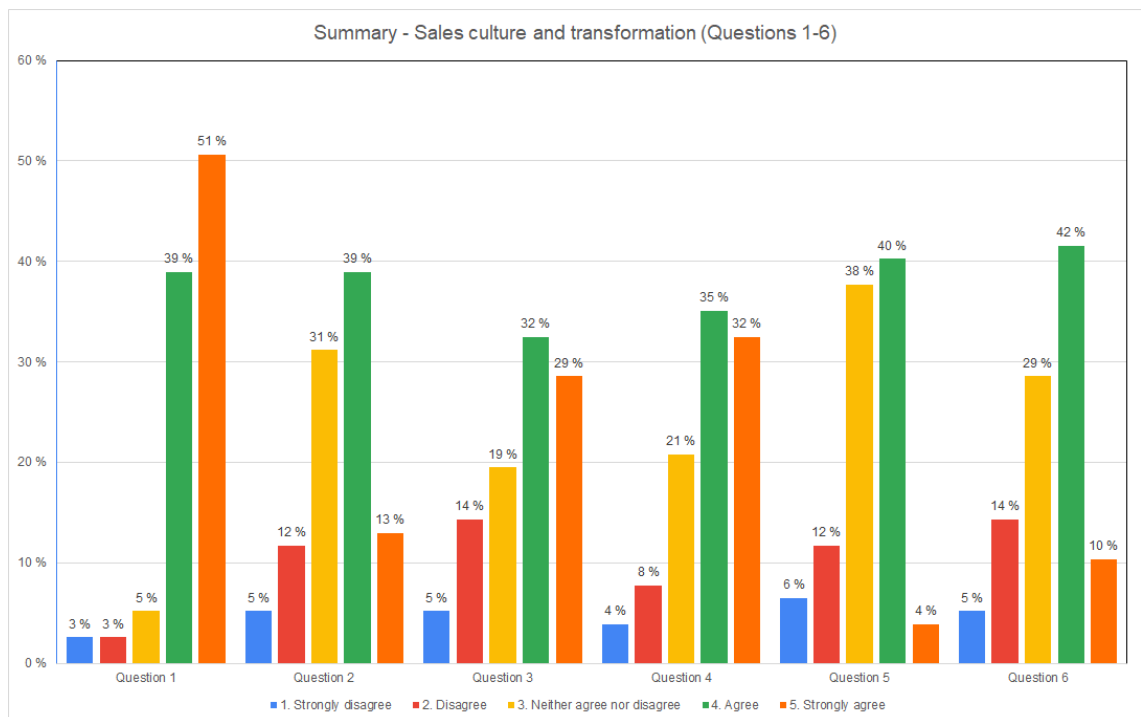


FIGURE 12. Summary – Sales culture and transformation (Questions 1-6).

Question 1

The first question, “it has been clearly communicated to me and I understand why Salesforce was introduced to use in [the company]”, focused on communication and understanding the grounds of the culture change. Lewis (2011) calls communication translating, which means implementing “any new tool or technique, process, or method of doing, from knowledge to practice”. When change is being implemented, strategic communication practices can help the different stakeholders describe, persuade, guide, resist, and evaluate the new and old practices (Lewis 2011). On average, the respondents unanimously seemed to have grasped the key reasons behind the deployment of Salesforce, as shown in Figure 12; 90 % answered either 4 (agree) or 5 (strongly agree).

Many respondents correctly stated some of the key reasons for the change, such as better management of sales pipeline and customer relationships, increased cooperation and transparency. Some also knew to mention that the sales culture change was linked to the new strategy of the case company, but not that many. Like already pointed out in the theory section, Katzenbach et al. (2018) asserted, the business strategy, operation model and culture are in strong coherence: business strategy directs the company towards the desired direction, the operating model represents the plan to reach there and culture is the motivation that guides and supports these two. When employees thoroughly understand the new strategic goals and what is expected from them in order to make it happen, they will be more engaged in bringing the new behaviour and culture forward.

In reference to this, quite a few respondents pointed out in the open comments that the communication mainly focused on boosting the use of Salesforce, while the aspect of cultural change was left with very little attention:

More noise about Salesforce, than sales itself (Manager, Tax & Legal).

It was not 100 % clear at the beginning, what happens after the actual implementation of Salesforce. The culture transformation has not had similar hype than the implementation part. (Senior Manager, Assurance.)

Covid-19 certainly has impacted the culture part as there is less interaction in real life. I think enough focus should be put on the culture change as well, so it's not forgotten. (Senior Manager, Assurance.)

It was left unclear in Assurance on who is using Salesforce, why are we using it and whose responsibility it is. It would have been easy to communicate this on an engagement level, but I have not heard anything yet. (Manager, Assurance.)

The comments indicated that the communications related to Salesforce implementation did successfully reach most people, but seemed to lack clear guidance and systematic approach towards the actual organisational change that the new CRM tool assisted in bringing forth in the case company. In other words, there was much more focus on the actual tool, Salesforce, rather than the sales culture change and strategy linked with it. It was Hofstede et al. (2010, 376), who stated that it is very common during culture change for the new symbols to attract the most attention as they are easily visible, however, they only play the most superficial level of culture, and if change does not reach the deeper levels of the culture, it will all just fade away quickly. Additionally, it was mentioned that there was more communication prior and during the first steps of the implementation, but was lacking follow-up efforts later on.

Question 2

The second question “the deployment of Salesforce has made me focus more on sales and client leadership” resulted in an average score of 3,4 (out of 5), as the results show in Figure 12. What was noteworthy among the responses was that 65 % of respondents in Assurance chose the grade between 1-3, while Advisory it was the opposite; 65 % of them chose a grade 4 or 5 and only 35 % chose 1-3. On the role-level the behavioural change related to sales and client leadership in Assurance did not reach the same level as it had managed to achieve in Advisory. Manager and Senior Manager -level employees especially had found themselves focusing more on sales since the CRM tool was introduced, as 62 % of them answered between 4-5.

It became clear from the results that the lack of time in orienting oneself to the new tool had brought its challenges in, however, on a positive side, some stated that due to the increased transparency they were able to see their colleagues closing sales, which inspired them to do the same. Also, the system had increased discipline which had been especially helpful to the leadership and managers to monitor the progress:

Salesforce is a good tool for leading sales and receiving extra information from clients. However it has brought a lot of extra work regarding opening the jobs and registering opportunities when there are plenty of projects and conversations going on. It feels that there is not enough time to report everything needed in the Salesforce. (Senior Manager, PCS.)

Salesforce has brought two additional aspects 1) I am more precise marking my efforts and I do look for info from Salesforce prior to meeting 2) This has enabled Sales Management for the first time in the company history – partly because I could use Salesforce as a catalyst to demolish the old unstructured way. (Partner, Advisory.)

Question 3

The respondents' motivation to change and registering their sales activities and opportunities in Salesforce was measured in the third question: "I am motivated to use Salesforce for registering my sales activities and opportunities". The average score was 3,6 and results were very divided; only a half of Assurance and Tax & Legal employees chose to either agree or strongly agree with the statement, while Advisory and PCS showed more motivation with 70 %. Special demotivation was indicated by the Managers of Assurance, who gave an average score of only 2,7. A few respondents from Assurance shared that due to lack of time to learn how to use the tool and due to the technical difficulties it initially had, they have remained demotivated and thus, refrained from fully changing their behaviour.

More than a few respondents pointed out that this change has resulted in moving administrative work from one place to another, which has in many cases been one of central causes of their lack of motivation:

Salesforce has increased work that was earlier done by the back office and support personnel. Their expertise is now going to vain, while managers try to insert information to Salesforce. Client data and creating of opportunities should remain as the job of the support personnel. Maintaining sales related information and communication can be the responsibility of the people doing client-related work. It takes an unreasonable amount of time to set up a client and opportunity in Salesforce. (Manager, Assurance.)

Creating more mandatory administrative work is not exactly motivating (Manager, Advisory).

It is very difficult to open clients and jobs in Salesforce, why administrative work has been dumped on the assurance teams? (Manager, Assurance).

Question 4

The question 4 “I have received enough support and training during deployment of Salesforce, and I know who I should contact for help”, was asked in order to find out whether there was something that could have been done differently during implementation in terms of coaching and training. The Partners and Directors among the respondents seemed the most satisfied with the help they had received so far; 77 % answered either 4 or 5. Overall, 68 % of respondents were satisfied with the support and answered to either agree or strongly agree with the statement above, however there were a few intriguing responses related to the topic:

Training was given before the launch, but after that there hasn't really been continuous support for us, but we've mainly tackled all problems ourselves (Manager, PCS).

Salesforce is a huge investment both in software and training costs. But it is not a one time investment, it should be continuous. (Manager, PCS.)

Cannot complain that there would be no support, but still, the support and training is based on the user manuals that are complicated as the system is complicated (Senior Manager, Tax & Legal).

Like Tracy (2015) pointed out, continuous coaching and sales management training should be arranged for sales employees to ensure they keep on the right track. One of the sales management's key tasks includes working alongside the sales team by observing and coaching. This is to find out if for example further training or support is required for the team to be able to perform even better; when the sales team is well equipped to work, manage and finalise sales, they are in for success. (James & Martini 2012, 123; Weinberg 2015, 127.) Also, if employees feel they are not getting the support they need, it becomes more and more difficult to change their mindsets and regain their confidence on the new sales culture later on in the run.

It was a conscious decision by the transformation project leadership that no traditional classroom training was to be arranged during this sales transformation project: a coaching network system was created instead, in which each employee was assigned with a coach. Based on the results it seems that for the most part it did work and there was a lot of positive feedback on the support received from coaches, however, continuous support after the implementation was missing as stated in the few comments above. Furthermore, some respondents stated that more training would be needed in terms of closing sales, as the support obtained by the time of the questionnaire was sent had mainly focused on the technical side:

I feel like we should get more training on sales strategy, tactics, how to close sales, who to approach in the organisation, etc. I have received none of this; just the mechanics of the sales process but it doesn't help me close sales. I have personally received coaching from some seniors which has been extremely helpful. (Manager, Advisory.)

Concerning training it was also mentioned by a few respondents that even the more junior-level employees should be included in the sales management process and taught sales-related thinking from early on. Below are a few suggestions from respondents related to the topic:

I think the Salesforce license should be more freely available to associates, not only through the exception process as in my case, as it is important to get used to a new way of working and selling from the start of work in [company]. (Associate, Tax & Legal.)

Thinking in terms of sales should be integrated as part of the Assurance training path already starting from A1 level. Of course there can't be direct sales targets, but the goal could for example be x amount of leads. (Manager, Assurance.)

It is crucial to develop strategic sales capabilities and provide training so that the knowledge trickles from partners and directors to more junior level experts. This probably happens informally to some extent but we absolutely should receive formal training on this, especially when getting a manager promotion. (Manager, Advisory.)

Questions 5-6

Questions 5 and 6 “I have noticed a change in the [company] culture in terms of sales and client leadership since Salesforce was deployed” and “I have noticed a change in my own ways of working and thinking in terms of sales and client leadership since Salesforce was deployed” dug deep into the respondents’ experiences of organisational culture change in the case company. As shown in Figure 12, around 40 % of respondents agreed with the statements giving average response rates of 3,2 and 3,4.

Respondents from the Advisory department indicated having noticed a slightly bigger change in their own sales related behaviour, compared to how the entire company’s culture and behaviour had changed; 54 % answered between 4-5 to question 5, while 62 % to question 6. PCS respondents also showed a similar development with 30 % responding between 4-5 to question 5 and 70 % chose

the grade 4-5 to question 6. Assurance respondents, however, showed an entirely opposite direction; 61 % responded between 1-3 to both questions, which meant that only 39 % agreed having detected some sales related cultural change in their own behaviour.

The open comments, however, expressed discrepancies on the topic:

Have not seen any real change in people's or my own sales behaviour (Senior Manager, Assurance).

Salesforce is used in many team meetings (Senior Manager, Advisory).

Yes, in certain cases I have noticed a change. For example: I have been contacted by specialists from other business units regarding my clients and this has been documented in Salesforce and assigned to other specialists with whom we have contacted the client. (Director, Assurance.)

The results indicate that the sales culture transformation is on the right track, however, more employees should be involved and contribute to the change for it to prosper. As advised in the theory part of this research, it is the employees' genuine emotional engagement that is needed for the change to become rooted in the company culture (Katzenbach et al. 2018; Schein & Schein 2016, 23-27). Below are a few direct quotes from the responses related to all employees' commitment to the change:

Broader usage is still required to get the full benefits. We are headed to the right direction, however. (Director, Advisory.)

Some have taken an active role, but the majority of the people don't see the added value and disregard the power of the tool (Senior Associate, Advisory).

Also, the impact that leaders' engagement and acting as examples has on the culture change, should not be belittled. Unsupportive leaders can do more harm than good. Leaders are in a central role during change; employees not only need

clear and strong change guidance, but also flexibility in case plans need to be changed on the way (Cameron & Green 2012, 340-341). A few respondents pointed out that leadership has not always shown the best example through their actions:

I still feel many people (partners especially) don't register their opportunities and conversations but instead write emails – the example should come from the top (Director, Advisory).

Cameron & Green (2012, 338) assert that the key step in their nine themes of cultural change is to always link it with the organisation's strategy, since it is the starting point in determining the areas that need improvement: "People need to be convinced by a compelling vision rather than compelled in a coercive way. They need to see the overwhelming logic of the proposed changes. The more people are drawn towards the vision the better." The strategy was accurately expressed as the key driver of culture change among the questionnaire responses, below is a good quote that summarizes the importance of the topic nicely:

I don't think this is driven by Salesforce, but our Strategy. Salesforce is needed, I'm not saying that it isn't, but I don't think it's driving much itself. (Director, Assurance.)

Question 7

The questionnaire's section of sales culture and client leadership transformation was summarised with the following open question: "Overall, how do you feel about the sales culture transformation at [the company]? Why?". Plenty of useful comments were received on the topic and the overall feeling among the respondents was excitement and many mentioned that the start has shown positive results, however, there is still a long way to go for a more thorough change in culture.

The case company had not yet been able to fully embrace the sales culture according to several respondents; and as mentioned already, many respondents stated that they had not noticed a change in the organisational sales culture other than introducing the Salesforce tool for use. In other words, the methods and the

tool had so far changed but culture had not. It came clear among the responses that the employees would like to know more of the sales transformation strategy itself, as the main focus has been overly focused on the technical aspects of Salesforce and introducing the tool to use. Below are a few quotes from the responses received.

I think that the culture is pretty much the same. We got a new tool to register and follow our sales but that is all for now. Maybe we have recognised that sales should be followed better and more. (Associate, PCS.)

We really need a CRM and sales oriented culture, but I feel that now we serve Salesforce not vice versa (Senior Manager, Tax & Legal.)

It's been quite Salesforce-driven, but I would hope that there would be a more systematic department level "sales transformation strategy and action plan" which would encompass fully also the "less system-related aspects" + really drive harmonization & optimization of sales practices across different "dimensions". Or maybe there is and I'm just not aware of it... (Senior Manager, Advisory.)

The responses indicate the employees concern over the amount of work Salesforce currently takes. Under the “potential challenges or CRM” section of this report, the importance of understanding that a CRM tool is not the solution to all problems, was highlighted. With careful planning however, one can avoid falling into the troublesome category where the company works for the CRM tool, instead of the other way around. If sales employees’ main focus becomes to record their sales activities instead of performing the work, the company is heading the wrong way. (Weinberg 2015, 25-28.) To summarise, tools do not change the culture, it is the people.

As earlier stated in this report by Weinberg (2015, 8-13), in a sustainable and productive sales culture the focus is on goals and results – once employees understand their personal goals and how their performance is evaluated and monitoring is done, employees perform better. Even though 91 % indicated in the demographics -part of the questionnaire being aware of their personal goals related

to sales and client leadership, some respondents pointed out in the open comments that there is some dissatisfaction over the topic:

There is still no real focus in Assurance on sales. There are no clear compensation incentives to do this. Yes I do believe that it has an overall impact but I still feel that people do not think that the compensation is not fair when you cannot see the direct relationship with your activities. (Director, Assurance.)

The sales targets are very high and we get no guidance as to how to reach them. The targets are the same for everyone regardless of whether trying to develop a new service area, or selling an established service that has already got references etc. This leads to suboptimisation and a short-term vision, where people have to either sacrifice getting to their targets / reaching anything higher than an impact tier 3-4 or stick to selling the old services. This is not motivating or conducive to a culture of innovation, which I believe is in the end crucial to ensuring top talent retention and maintaining [company] ahead of our clients instead of being reactive. (Manager, Advisory.)

The fifth culture change theme by Cameron & Green (2012, 340) suggested to build on the old and after that, step into the new: “You will need to retain and build on the current strengths and ensure that you do not throw the baby out with the bathwater.” Trompenaars & Hampden-Turner (2020) also presented in their change framework that the core is to retain the current values and develop them towards the envisioned future. The similar kind of lack of focus and trying to change too much at the same time was mentioned by a few respondents. One Senior Manager from Assurance for example stated “I was excited about Salesforce but I think that we're trying to do too many things with it.” The adoption of the new CRM tool, Salesforce, was itself a big project in terms of getting all employees accustomed to new processes and ways of working, not forgetting the adoption of a sales-focused culture, which was also pushed at the same time.

Quite a few respondents stated again that more training and knowledge sharing would be needed in terms of Salesforce and sales transformation for a better adoption of the new culture, as seen from the comments below. When employees

experience success and see the positive results, they tend to internalise new methods quicker; leaders can do whatever it takes to enable the change, however, culture change does not happen unless people become satisfied and start sharing experiences. (Kotter 2012, 166; Schein & Schein 2016, 338-339.)

Assurance would need more guidance and best practices on how to utilize Salesforce as we are not performing sales activities daily. Also would like to know how to include younger team members. (Manager, Assurance.)

I think there's still quite a bit of work to be done especially in daily practices regarding the use of Salesforce. I haven't had personal success stories yet revolving around the use of Salesforce and it would be interesting to hear some concrete examples of it. (Senior Associate, Advisory.)

I believe that the benefits of using Salesforce are not known to many, which hinders the sales culture transformation (Senior Associate, Tax & Legal.)

Lastly, it came through from the results that especially the Assurance employees had experienced challenges with the sales culture transformation and the use of the new CRM tool. Below are just a few examples of them.

In my opinion the deployment of Salesforce has not impacted the sales culture of the regional offices (Manager, Assurance).

I think we are going towards the right direction. One thing that I hope is that we would not compare the other departments with Assurance as for us Managers-Directors we spend just a very marginal time on sales activities. We have client relationships that last for decades and the environment is so different compared to the other departments. (Director, Assurance.)

Slowly but surely. People have a bit of a negative view on sales (in Assurance) and we should see it more as client service and client excellence. Hoping for more collaboration between departments. (Director, Assurance.)

5.1.3 Questionnaire results – sales activities and opportunities

The questions 8-16 were dedicated to sales activities and opportunities and the use of the Salesforce tool. The goal of these questions was to especially focus on the last sub-research question of this thesis: did the adoption of Salesforce encourage and increase sales-oriented behaviour in the case company? First there is a summary of questions 8, 10-11 and 13-16 on the scale of 1-5, as depicted in Figure 13 below, and the results of question 9 and 12 are demonstrated separately later on in this chapter due to different scaling and request nature.

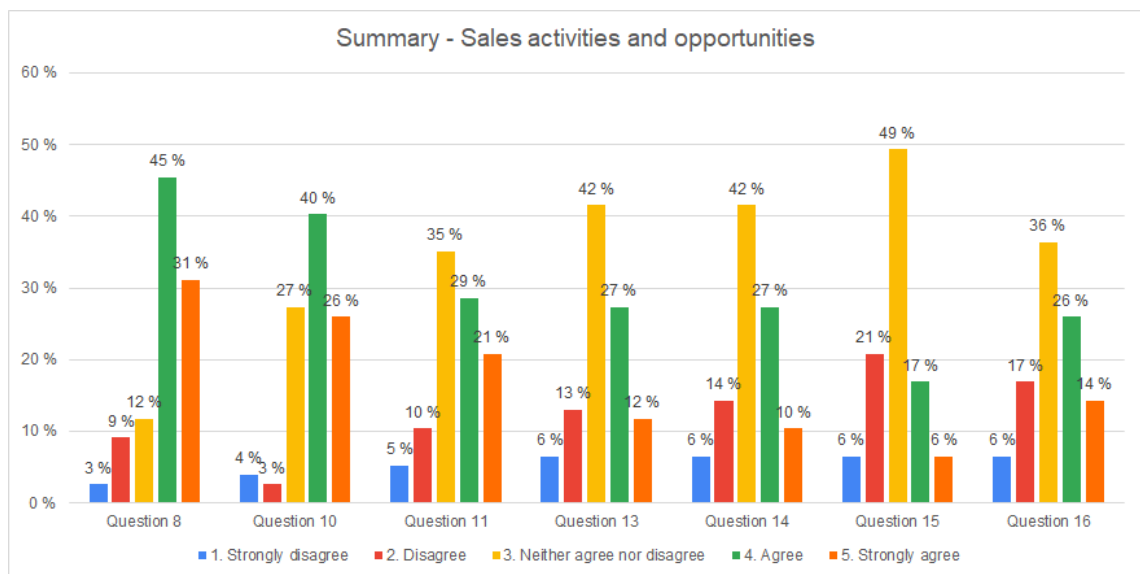


FIGURE 13. Summary – Sales activities and opportunities (Questions 8, 10-11 and 13-16).

Question 8

The question 8 “I know how to use and I utilise Salesforce for registering my sales activities and opportunities” reached an average rate of 3,9, which was the highest score among the questions of this section of the questionnaire, as drawn in Figure 13. A total of 59 of the 77 respondents replied that they either agree or strongly agree with the statement in question 8.

There was no quotable difference across departments; more than 70 % of the employees in each department (Assurance, Advisory, Tax & Legal and PCS) agreed with it. Some of the open comments, however, once again (like in question 4’s results) indicated that further training would be needed since the new CRM

tool is difficult to use. One Manager working in the regional offices said he/she is still waiting for coaching on the use of the tool, while a Senior Associate from Advisory was content and seemed to have received enough support and training. Lack of time to focus on learning the new tool also was mentioned by some of the respondents mainly from Assurance.

With the guidelines, you can't use the system intuitively, but have to always be conscious of the risk management and processes (Manager, Advisory).

The user interface is not as intuitive as I thought from a service that costs so much. Too many irrelevant fields are there that will never be used – or maybe there needs to be a clearer reasoning for filling out all those fields. (Senior Associate, Advisory.)

Salesforce is complex and creating routine opportunities takes an excessive amount of time (Manager, Assurance).

Question 9

The Figure 14 presents a summary of how long it takes for the respondents to complete different tasks in Salesforce. This question was added to the questionnaire in order to gain data and better understanding on how time consuming the different tasks actually were; this helped indicate whether there were some areas which needed special attention or corrective actions from the case company's end.

Based on the results, creating a sales-related activity and a client contact were seen more effortless than creating an opportunity, which seemed to take the most time according to the respondents: 58 % stated that a contact takes less than 5 minutes to create, while opportunity creation was said by 35 % to take between 5-10 minutes and 30 % responded more than 10 minutes. Creating an account was not yet performed by many during the time the questionnaire was rolled out, which is why 42 % answered "N/A (I haven't done this myself so far)" on it. Opportunity creation definitely was considered the most time-consuming, which is a

good point to further investigate in the case company whether robotics or alternative solutions could be developed to support the process in a more efficient way.

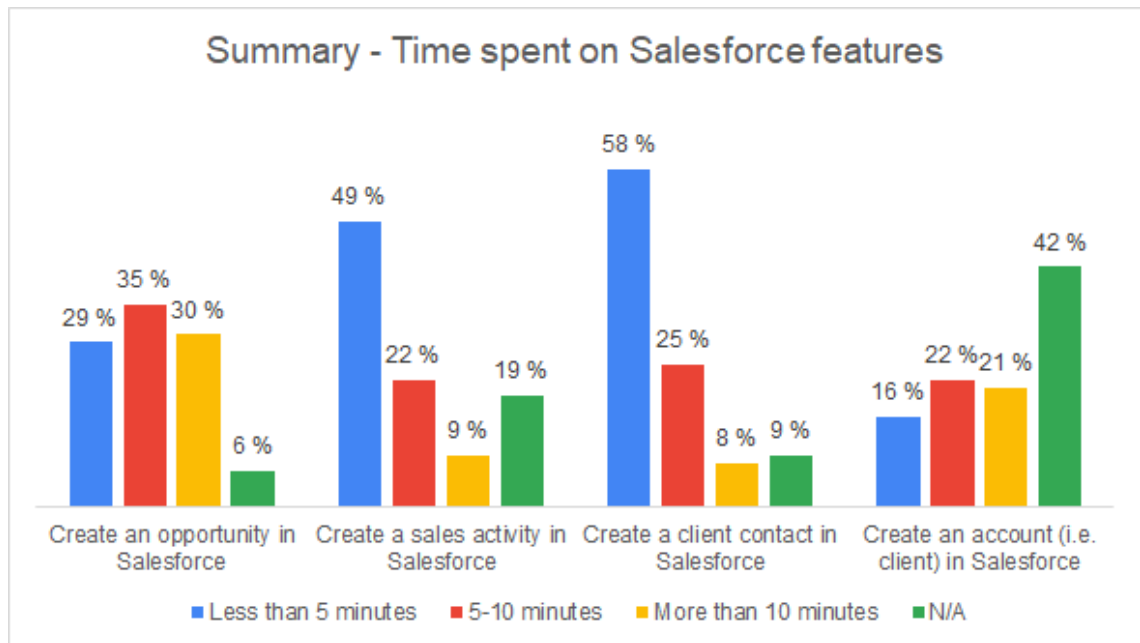


FIGURE 14. Summary – Time spent on Salesforce features (Question 9).

Question 10

The 10th question delved into the success of the case company's sales transformation project with the question "I have continued using emails instead of Salesforce chatter for managing my sales activities together with my colleagues", which obtained an average score of 3,8. What it meant was that 66 % of the respondents agreed and had still adhered to old methods, such as sending emails for managing their sales activities instead of completely switching to Salesforce. Chatter is a collaboration tool inside Salesforce that users can utilise for instance for giving a status update on a sales activity or such.

Respondents pointed out that emails and phone calls are still more efficient methods of reaching their colleagues quickly and also to ensure follow up, as shown below. Many respondents stated that they tried switching to Salesforce, but their colleagues' passiveness towards the change made them in some cases to even return to their old behaviours as well.

Easier to reach people by email, since not that many check their daily digest / notifications in Salesforce (Senior Associate, Advisory).

Using both in parallel to ensure timely reaction (Director, Assurance).

Other people don't read/notice my chatter messages although I tag them. Faster to just email instead of send an email saying "go read this in Salesforce". (Senior Associate, Advisory.)

I'm trying to use chatter as much as possible even though I see that not everyone else is doing that. Sometimes I'm preferring email if the matter includes sensitive information that cannot be published in Salesforce (however, I do recognize that high-level comments could still be booked in Salesforce). (Manager, PCS.)

A Director from Assurance said it well that the transition towards Salesforce “only works if everybody spends more time on Salesforce than email”, which undoubtedly relates to the fact that old habits are hard to unlearn. Schein & Schein (2016, 339) asserted that it is common to think the old ways were better and that it is not worth the trouble to start learning new methods, which is why it would be smart reserve time for employees to first unlearn the old habits and only after that start bringing in the new.

Question 11

As presented in Figure 13, half of the respondents (51 %) chose a grade between 1-3 and 49 % between 4-5 to the question number 11 “Registering and managing my sales activities and opportunities in Salesforce is more efficient as opposed to how I processed them earlier”. Especially the Partners and Directors were more satisfied with the tool’s efficiency, since 68 % of them chose either to agree (grade 4) or strongly agree (grade 5) with the statement above, while Senior Associates and Associates were the least satisfied among the respondents with only 38 % of them choosing the grade 4 or 5.

Based on the results, there is a clear distinction between the respondents who have seen the efficiencies that the new CRM tool has brought in and between the

others who have not. Prior to Salesforce, the case company's administrative personnel were responsible for registering all opportunities to the previous ERP system and there was no CRM system for registering rest of their sales activities, such as sales meetings or leads at all, so every employee had their own systems or manners of performing the work (such as excels, emails or similar). This was a big change especially for the employees who were previously not used to recording their sales activities anywhere or were able to ask assistance from the administration for the purpose.

Question 12

In the question 12 the respondents were asked to give an overall grade between 1-5 to Salesforce as the tool for managing their sales activities and opportunities. The results are shown in Figure 15. On average, the respondents scored Salesforce with the grade 3,4: 6 % were unsatisfied and 10 % considered the tool to be sufficient, while 25 % said it was satisfactory and 55 % regarded it very good and lastly, 4 % thought it was an excellent tool for the purpose. Respondents from Advisory and PCS were most satisfied with the tool, as 62 % of Advisory and 70 % of PCS respondents chose grade 4-5, while Assurance and Tax & Legal respondents were almost 50-50 divided between being satisfied and not at all satisfied. There were no differences between respondents' roles worth mentioning.

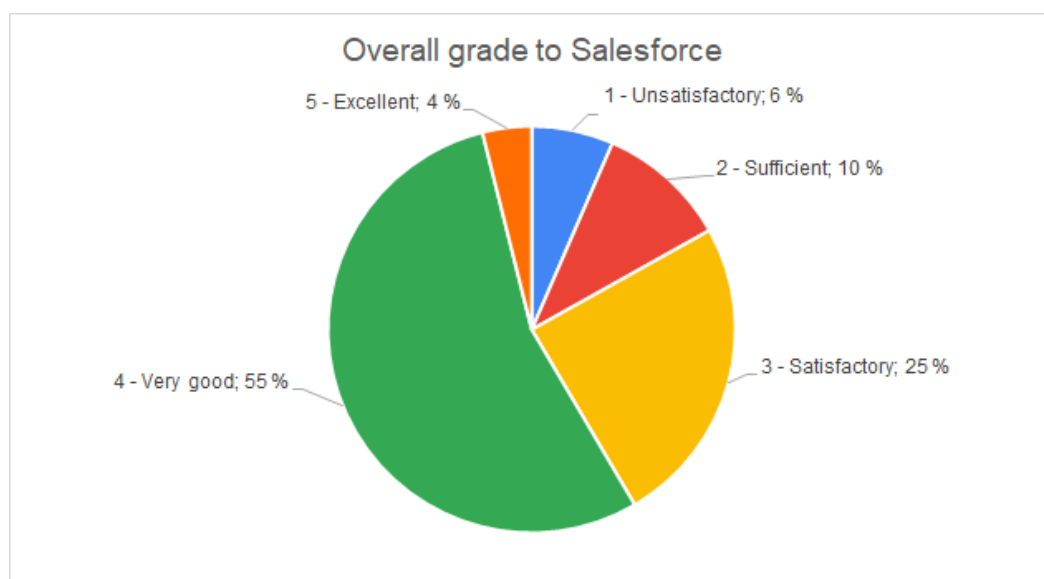


FIGURE 15. Overall grade to Salesforce (Question 12).

Question 13

The question “I regularly maintain my client contacts in Salesforce and feel it is important to keep them up to date” was dedicated to the management of client contact data due to the fact that one of the key factors when it comes to CRM, is ensuring that the past, current and prospective client relationship data is up to date (Anderson & Kerr 2002; Santos 2019, 132). The average score was 3,2 and the spread is visible in Figure 13.

In PCS the respondents seemed to really understand the importance of client data management, as 70 % of them responded either to agree or strongly agree with the statement. However, the Assurance and Advisory showed an entirely different trend as only 23 % of Assurance and 38 % of Advisory respondents chose the score 4 or 5. It was also noteworthy that of Partners and Directors, 77 % said they do not maintain their client contacts regularly and they do not think it is important to keep them up to date. This re-brings up the question of leading by example, in which they are in a very crucial role – unsupportive leaders can be harmful during change. This is why leaders chosen for the task at hand should always be in line with the target culture (Kotter 2012, 166; Groysberg et al 2018).

The respondents explained that they understand the importance of managing one’s client contact data, but are either too busy with other work, do not know how or are not motivated enough to do it:

I know it's important but as I don't see the progress it's not motivating enough (Director, Advisory).

I think it is very important to have a clear master database for client information. I have mostly updated client contacts if I had to create one for an opportunity but I haven't kept up with the information or checked whether some information is outdated. (Senior Associate, Advisory.)

No process nor clear guidelines who should do what (Senior Manager, Advisory).

I'm not sure what my contacts are and how to see them (Partner, Assurance).

Some also pointed out that they do not know how to do the updates efficiently, which indicates that further support and sharing of best practices would be needed to ensure people's interest towards the use of the tool and into the sales management practices is not lost:

Requires quite a lot of manual effort. Introhive helps a bit even though it's maybe not the most self-explanatory tool... Would be great if there could be some more automation based on LinkedIn, i.e. when a person changes role/company there, this would automatically trigger some "easy to act on" update suggestion to the contact owner (which cannot be easily simply skipped...). (Senior Manager, Advisory.)

Question 14

The Figure 13 indicates that 42 % of respondents chose 3 – Neither agree nor disagree to question 14 “The deployment of Salesforce has helped me increase cooperation across departments for example by involving my colleagues when interacting with clients”. The average score to this question was 3,2. The Assurance and Tax Senior Managers and Managers who answered to this questionnaire gave the lowest average score, 2,8, while other roles did not show as much disagreement with the statement.

According to many of the respondents, openness and cooperation has indeed increased with the help of Salesforce, and many also have found the data recorded in the tool useful in terms of cooperation with their colleagues:

This is one area that Salesforce has helped tremendously (Director, Advisory).

Easier to see what other departments are up to (Senior Associate, Advisory).

I feel that the cooperation has increased but I cannot say that it's only because of Salesforce (Manager, PCS).

There were also more passive comments received on the topic, which very aptly pointed out that the CRM tool is not the one doing the work and inspiring cooperation, it is the people. A few of these comments are listed below. In reference to this, it is essential to keep in mind that if sales personnel become more focused on timely recording their sales opportunities rather than doing the actual work, the organisation is moving fast towards an undesired direction (Weinberg 2015, 25-28).

Not any essential effects to co-operations (Manager, Assurance).

Salesforce does not engage users (across departments), it just records them. People and the actual reason for cooperation engage users. (Partner, Advisory.)

I don't know how Salesforce should support me with this task (Director, Advisory).

My cross departmental co-operation and contacts are not based on an IT system (Senior Manager, Assurance).

Questions 15-16

The question 15 "Information visible in Salesforce has helped me to have better conversations with client contacts" received the lowest average grade (3,0) among questions under the section sales activities and opportunities. As indicated in the spread in Figure 13, 27 % of the respondents chose to either disagree or strongly disagree with the statement, which indicates the highest dissatisfaction rate of all the questions in the questionnaire. There were no major differences among the departments, however, Advisory and Tax & Legal indicated an even bigger dissatisfaction rate: 85 % in Advisory and 80 % in Tax & Legal answered between 1-3. In addition to that, 80 % of Managers and Senior Managers also answered between 1-3, while other roles seemed to have found Salesforce slightly more helpful in maintaining their client conversations.

As opposed to question 15, the questionnaire's last statement focused on the internal collaboration and whether Salesforce has been found helpful in maintaining internal sales related conversations: "Information visible in Salesforce has helped me to have better conversations internally with colleagues". While only 23 % of the respondents agreed or strongly agreed that client conversations had improved due to the data found from Salesforce, 40 % agreed or strongly agreed that there has been positive advancements over internal conversations. Partners and Directors, as well as Managers and Senior Managers were slightly more sceptical; nearly 60 % of respondents in both groups were more likely to disagree with the statement.

The respondents identified some positive sides that the Salesforce tool has brought (or would bring) in the case company in terms of increased transparency and visibility over who is doing what:

Can identify who has recently talked to the client already and see what the client has been previously interested in (Associate, Tax & Legal).

Yes, because now I know what other departments have done to the client. Before I didn't know what work other departments had done because the information never reached me. (Manager, Assurance.)

If the information on meetings and completed procedures is up to date in Salesforce, you can check there to see where we are at prior to calling the client. No need to check with the client whether things have proceeded. (Manager, Assurance.)

Salesforce supports with sales management meetings (Director, Advisory).

Regardless of the positive aspects, many pointed out that there is a lot of potential, however, much more needs to be done before they are able to get there. Like the comments below describe, it is apparent that further actions are needed to ensure that more people start utilising Salesforce for registering their client data. As mentioned earlier in this report, Baker (2020) and Junkkari (2020) assert that

one of the key steps in sales management is to timely report one's sales activities, since that is what helps identifying critical client information like win rates, average sales cycles and future prospects.

Salesforce does not yet include so much information that would have helped me in client conversations (Senior Manager, PCS).

A lot of client contact data is still missing – for example if we want to understand who knows client X in country Z, it's not necessary yet recorded in Salesforce (Manager, Advisory).

The data is not sufficient yet (Senior Associate, Advisory).

Salesforce is not yet used in a way that it would offer valuable information (Manager, PCS).

We are still struggling with the Client account team for getting the right data to see the opportunities, client contacts etc. The dashboards are not good. (Senior Associate, Advisory.)

5.2 Data extract findings

The main purpose of the data extracts was to help investigate and measure the current success and direction of the organisational culture change. For this purpose, sales-related data, such as activities and opportunities as well as client contacts created within the timeframe of April-October 2019 were extracted from the previous ERP system and compared with a similar extract from April-October 2020 from the new system, Salesforce. Comparing the two sets of data and cross-checking them against the questionnaire findings helped indicate whether employees' behaviour in terms of sales and client leadership is moving towards the desired direction.

The administrative employees were mainly responsible for registering and maintaining the sales data in the previous ERP, however, since Salesforce was introduced, the task was moved to the attention of the employees personally involved

with sales. The employees involved with sales were now responsible for maintaining their own sales contacts and opportunities themselves. In terms of the data extracts this meant that there should be clear change in the roles performing the work. Also, since in the previous ERP only the won activities were registered, while in Salesforce, all activities regardless of being won or lost, but also sales meetings and leads were logged in the system. Therefore, there would be an evident increase in the numeric amount of registered sales activities when comparing the data between the two different ERP systems. The findings of the data extracts are broken down below under three categories: opportunities, contacts and activities.

Opportunities

In terms of opportunities, it was clear to see a change in behaviour as 100 % of them were created by administrative personnel in the past, while in Salesforce, only 15 % and the rest, 85 % were completed by other roles. Figure 16 below indicates the roles who registered opportunities in Salesforce between April-October 2020. It was noteworthy in the Salesforce data that out of the 1 330 opportunities created in Assurance, 32 % were created by administrative roles, while for example in Tax & Legal out of the total of 1 164 opportunities, only 1 % were created by the administrative employees. This can of course be explained by the business side differences in practices and through the fact that in Assurance only Managers and above have a Salesforce license, while in Tax & Legal also Associates and Senior Associates are granted licenses to use the tool.

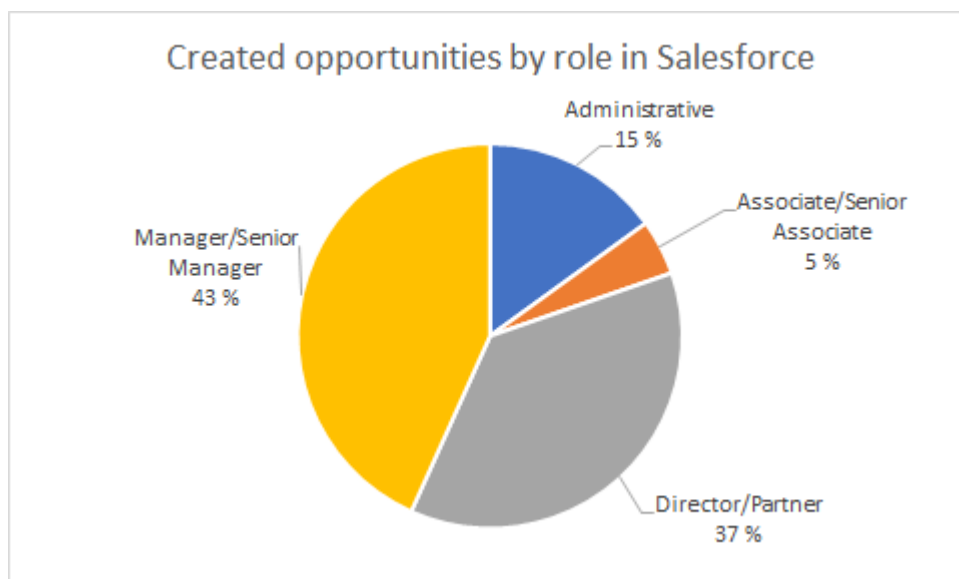


FIGURE 16. Created opportunities by role in Salesforce.

Contacts

When comparing the contact creation data between previous ERP and Salesforce, it is clear to see that the numbers have increased – only 28 % percent of administrative personnel had still registered contact data since the adoption of Salesforce, while before it was as much as 92 %. The breakdown between roles is demonstrated in Figure 17. During the previous ERP, the creation and maintenance of client contacts were majorly controlled by the administration, as out of approximately 2 300 contacts created in between April-October 2019 only 8 % were done by other roles than administrative. However, out of the approximately 3 700 contacts created a year later in Salesforce, administrative personnel were responsible for only 28 % of them.

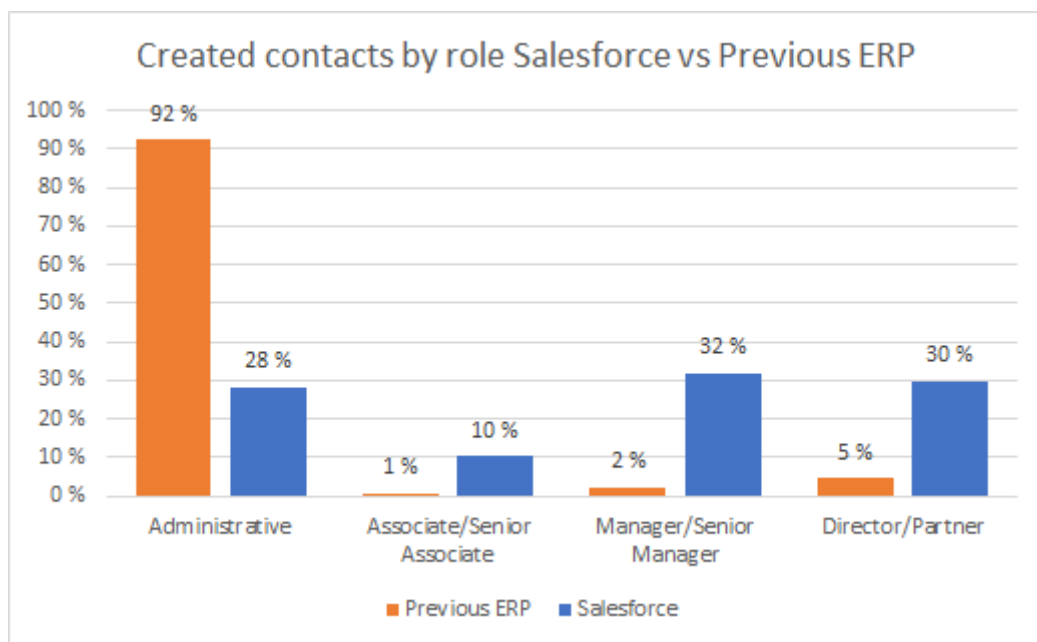


FIGURE 17. Created contacts by role Salesforce vs previous ERP.

The biggest change in behaviour in terms of created contacts was found in Advisory, since in the previous ERP administration created 89 % of all of their contacts, while in Salesforce the same figure was only 9 %. Other departments, Assurance and Tax & Legal, also showed a significant decrease, but not as drastically as in Advisory; in Assurance 43 % and in Tax & Legal 38 % of contacts were still created by Administrative roles since Salesforce was taken into use in the case company.

Activities

The activities in this context refer for example to registering of sales-related calls, meetings with clients, emails and advancing sales tasks or other activities relating to sales. During the previous ERP system it was technically possible, but not that common (as the system was not meant for it) for employees to register their sales activities into one place for everyone to see: only nearly 500 of such activities were registered within April-October 2019, while it increased to around 5 100 activities within the timeframe of April-October 2020. Since the previous ERP was not really set up for sales data management, it is important to underline that the figures between previous ERP and Salesforce are not comparable, but instead useful to be utilised for indicating who has been recording the activities in the system; administration or sales employees.

As shown in Figure 18, the responsibility has clearly moved from the attention of administration to the other roles. In Advisory and Assurance, Partners or Directors and Managers or Senior Managers have been more active as around 60-70 % of the activities in those departments were created by them. While in Tax & Legal, the Manager-levels were responsible for 40 % and Directors or Partners, 54 % of the activities registered in their department.

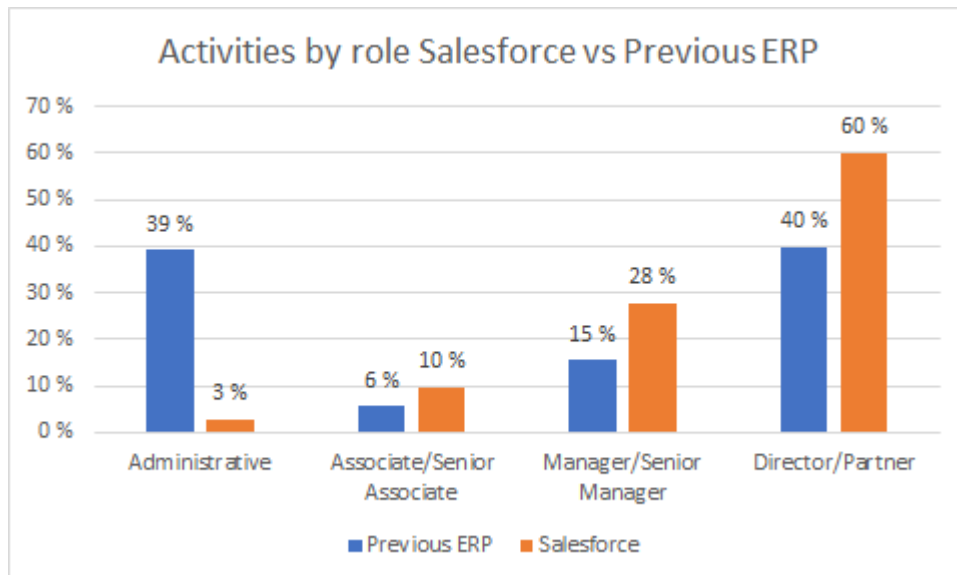


FIGURE 18. Activities by role Salesforce vs previous ERP.

6 DISCUSSION

Based on the findings specified in the previous chapter, there were three key themes that came up as a result of this research: training, goals and compensations, as well as the fact that people are the ones who change culture, not tools. A summary of these key themes is detailed in the first subchapter, followed by the related conclusions and recommendations and finally, suggestions for further research.

6.1 Key themes

People change culture, not the tool

As suggested by many of the respondents, there indeed was a need for a structured CRM tool for managing one's sales data. However, everyone needs to be involved in advancing the change for it to succeed and to become rooted in the organisation culture – this was one of the key challenges noted during this research. Infact, it is not the start of the use of the new CRM tool, Salesforce, that in itself changes the culture, it is the people.

Changing an organisational culture is a challenge that takes thorough planning and is not something that should be done in a rush, nor without a clear vision. The questionnaire unfolded that to some extent the respondents seemed to have been confused about the goals and vision of the culture change, and how it is linked to the organisation's new strategy. It seems there was a good plan, however, the communications of it did not seem to completely reach the crowds; employees were unaware of what was expected from them in terms of assisting the organisation in reaching its strategic goals related to sales and client leadership. In other words, the change in culture did not receive the same attention as the new CRM tool, Salesforce, and its functionalities, did.

In addition to this, the results showed that a better lead by example -methods would have been needed from the management, as respondents found it demotivating to change their own behaviour when some of their peers were stuck with old manners and even showed resistance towards change. Like the results of question 13 indicated, 77 % of Partners and Directors said they do not maintain

their client contacts regularly and they do not think it is important to keep them up to date, but interestingly they are usually the ones who have the most relevant client data to maintain. It was also mentioned that there should have been more time left for unlearning the old, before being able to completely adapt to the new. In reference to that, respondents claimed that too many things were tried to be changed at the same time, which created frustration while trying to absorb too much at once.

After analysing the data extracts, it was easy to see the drastic increase in experts' administrative work; more than 10 000 activities, opportunities and client data were created by them in the new CRM, which is an enormous increase from the earlier amount of around 500 from the year before. The new tool meant a complete change in roles and processes, as what was used to be done by administration, had to be done by the experts themselves. Based on the results, this caused a lack of motivation. Administrative work is something that the experts have experienced as unmotivational for ages; the common perception is that the more administrative work there is, the less time there is to do sales and eventually create revenue for the company. This is something that is very common in many of the professional organisations, like in the case company as well.

Training

The results of the questionnaire revealed that the employees wanted more focused training in terms of the CRM tool – training that would better take into account the differences between the different departments. This was due to the fact that the support provided previously was found unfair and nonfunctional since there are differences between the departments in terms of the amounts of clients and opportunities, as well as the nature of the engagements. More repetition was also said to be needed to ensure the correct use and interest towards the use of Salesforce, as that would help increase the shared benefits.

What also was an interesting point was that the current training had been very much focused on the technical aspects of the tool, while many expressed that they would also need training on sales aspects and how to for instance actually close sales. This kind of training, according to the respondents, would be good to have starting from earlier stages in one's career at the case company.

It was suggested that a Salesforce license and sales training could be granted more freely also to the junior-level employees, since that would help embed the new way of working and sales-related thinking and working into the culture from early on. Respondents especially from Assurance pointed out that due to the nature of the business they are involved in, sales is considered quite a narrow playing field, however, with correct training and creating a sales-focused mindset also for the junior-level employees, they could be able to better assist bringing the sales leads into the company's other departments.

Goals & compensations

The goals and compensations were chosen as one of the key findings of this research since it came across as being a very burning topic in the case company. Respondents were stating fairly adamantly that the focus points in relation to sales and sales goals as well as compensation incentives should be differentiated across the departments. The fact is that the departments and their businesses are very different from one another, in which case it would be fair to see differences in terms of goals and compensation as well.

Respondents also expressed that more efforts would need to be done in order to attain everyone's absolute focus towards sales. Lack of clear compensation incentives was mentioned as being one of the barriers hindering the change of the employees' mindset towards more sales-centered. The bare fact is, as mentioned earlier in the theory part of this report by Junkkari (2020), that when employees understand what is expected from them and how performance is measured, they are more likely to succeed in their work.

6.2 Conclusions and recommendations

To reach the core of this thesis, how did the findings answer the research question and its sub-questions?

Is the case company on the right track towards successfully changing its organisational culture?

- Are the employees motivated to use Salesforce and do they support the organisational culture change?
- Is the current organisational culture, leadership and employee behaviour showing focus towards sales and client leadership since Salesforce was adopted?
- Did the adoption of Salesforce encourage and increase sales-oriented behaviour in the case company?

It is safe to say that even though it was an early stage of the change when this research was conducted, the case company was progressing towards successfully changing its organisational culture. The employees were mainly motivated and supportive of the change and the behavioural patterns related to recording of sales activities indicated increase and positive developments; both the general atmosphere that came across from the questionnaire results and findings from the data extract indicated an emergence of culture change. However, based on the key findings presented in the previous chapter, some adjustments would need to be made to ensure the employees' continued level of motivation and commitment towards the transformation goals, as well as a deeper understanding of what is going on in terms of the change.

One of the key findings of this research was that the employees clearly had failed to fully understand that there even was a culture change going on. Salesforce received a lot of attention, which was good since it was in a crucial position in terms of moving towards a sales and client leadership culture, however, Salesforce is only a tool supporting the change, and does not change anything on its own. What it did was that it created confusion as many did not understand the bigger picture behind the use of Salesforce. This again brings out the question of strategy and how it was communicated to the employees, or as Baker (2020)

said that it is critical to build a sales process, which follows the set a vision and strategy, as it keeps the team aligned and working towards the same goals. Interestingly 91 % stated in the questionnaire to be aware of their personal sales-related goals, but in practice it did not seem to be the case.

Many respondents found the current goals and compensations, at least to some extent, a frustrating and demotivating topic. Which is why it is recommended to effectively and timely communicate reminders of strategy together with a crystal clear guidance on the related individual goals and compensations. In other words it would mean communicating on a very concrete level instead of an abstract high level, that “this is what we need from you to do to get where we want to be at” and “this is how your performance will be measured”. Culture and its strong linkage towards strategy, as well as clear two-communication related to it is not a thing to be dismissed, with a focus especially on the communication being from top-down to the other way as well. When processes are created in collaboration and considering each individual, employees are more likely to adopt it to use (Junkkari 2020; Tracy 2015). In terms of compensations Schneider (2017) nicely points out that the fundamentals for successfully adapting to change are to first create a profit-sharing program of which everyone benefits from if the organisation succeeds, then implement a system for goal-attainment and lastly, to celebrate accomplishments throughout the way.

What also came across from the findings was a method for elevating and maintaining motivation; arranging more focused sales training for each of the departments separately. The business-related differences should be better taken into consideration during the training. Many respondents stated that they needed and wanted training related to sales and that it would be a good idea to not only add it among the standard points of the junior employees’ annual training programme, but also for newly joined employees. Tracy (2015) as well highlights the importance of training by stating that employees are able to keep on the right track with the help of continuous sales management coaching and training.

In addition to training, the respondents pointed out that useful channels and methods of sharing success stories and best practices in the use of Salesforce as well as in sales practices, would be very much needed. When employees are aware

of the benefits and achievements their peers have reached, their motivation not only towards the use of Salesforce but also towards the new sales culture, could grow positively and it would be faster for them to internalise the new. To quote Schein & Schein (2016, 338-339) “A leader can impose new ways of doing things, can articulate new goals and means, and can change reward and control systems, but none of those changes will produce culture change unless the new way of doing things actually works better and provides the members a new set of shared experiences that eventually become perceived to be a change in the culture.”

Involving the junior levels in all sales activities and processes from early on was also something that was considered beneficial, as it would help build better understanding of sales topics from early on and eventually, could assist in further embedding the sales and client leadership culture in the case company. The results also unveiled that the senior levels would also need training or at least a gentle reminder in order to be better examples for the juniors. The power of leading by example should never be underestimated.

The scale of the change was big and a lot to process at one time, however, it does not mean it was done wrong. As indicated in the results, a big change and not having enough time to get accustomed to it could risk leaving everyone overwhelmed and opposed towards changing their behaviour. Changes in organisations, no matter how big or small, can easily come undone even after years or effort if the company does not succeed in firmly anchoring the new methods in the company's norms and values (Hofstede et al. 2010, 375-377; Kotter 2012, 157). The solution could for example be to take smaller steps at a time and not being too ambitious with it, as well as actively and timely listening to employees' concerns and suggestions for improvement, and most importantly, putting them quickly into use whenever possible.

In reference to this, it ought to be also mentioned that ensuring the current organisational structures, systems and processes actually support the desired culture is essential, since that significantly helps the adoption of the new culture (Groysberg et al 2018). The questionnaire results indicated a confusion in regards to

this matter and respondents pointed out that since the case company's departments and their businesses are very different from each other, why was the change introduced to everyone without considering these particular differences? The way the case company employees experienced it was that a certain pre structured change template was enforced to be put to use everywhere, without paying enough attention to the dissimilarities. Few examples of how to fix this would be to effectively collect feedback from all levels of employees and to be agile in rerouting the change on the way based on the comments and findings received.

Additionally, the author of this research also wanted to point out after observing the employees and the general discussion over the change project on the side-line, that the quality and correctness of the data inserted in Salesforce could suffer if no continuous training and sharing of knowledge and best practices was arranged and paid more attention to in the future. There was a lot of tacit knowledge that the administrative personnel knew and shared amongst each other while doing the work in the previous ERP system. The experts who already have limited time to complete the tasks, may cut corners simply due to the lack of time or knowledge, which would in worst case scenario result in poor quality of data.

Cultural changes always require a psychologically painful period of unlearning the old, before being able to fully embrace the new (Schein & Schein 2016, 339). Since the culture transformation in the case company was rather in its baby steps while this research was conducted, it was noticeable that the psychologically painful period was afoot at the time. Respondents declared that too many things were tried to be changed at the same time – the culture, the tools and processes, the people doing the work and so forth. More administrative work was now pushed to the experts' table and they did not seem too excited about it. Culture change is definitely a project that can easily fail.

6.3 Suggestions for further research

As mentioned earlier in this report, conducting a comprehensive research on culture change can take years and years, which is why it was not possible to study a complete culture change while the new CRM tool was just recently adopted to use. However, this research provided a good starting point to further investigations of culture change on a larger scale in the future. Since this research gave information on the current success of the transformation project in the case company, it would be interesting to conduct another touch point within a couple years to see whether the change has actually succeeded or not.

Additionally, it would be great to find out the entire company's sentiment and point of view on the culture transformation, as inevitably in a company of more than a thousand employees the change has had some either direct or indirect impact on their role or ways of working, regardless of working with sales directly or not. This research was limited to investigating the sales culture transformation, which is why the questionnaire was sent to the experts who work with sales, while the administration and junior-level roles were completely scoped out. Especially the administrative personnel would most probably have quite a good insight on the topic, since it impacted their roles and ways of working quite drastically as well.

At the time of this research, the Covid-19 pandemic was changing the world quite drastically, therefore it would be worthwhile to study how it had changed the management of company cultures. Many companies quickly had to adapt to remote working, which brought challenges to companies where the culture is very much focused on face-to-face collaboration. How did it impact the culture? What does the leadership have to do differently to reach the employees and ensure they are doing well?

Lastly, it would be really interesting to be able to investigate during culture change that does the new accomplished culture really match with the ideal and do all the employees in different roles and functions agree with and understand it. Subcultures are also an intriguing topic; some of the dominant subcultures can overpower even the dominant key cultures, so how can the company recognise and maintain them? There are also other interesting aspects of transformation that

could be looked further into; communications, leadership performance during change, change resistance, project management, what drives change motivation, just to mention a few examples. There are endless options.

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APPENDICES

Appendix 1. Questionnaire.

Salesforce survey 16.-30.11.2020

This survey is a part of a Master's Thesis research conducted for [the company] in the aspect of sales and client leadership transformation. The results are used for investigating organisational culture transformation, but also for gaining useful insights on the current status and success in introducing Salesforce at [the company].

There are three sections to this survey: 1) background information, 2) sales culture and transformation, and 3) sales activities and opportunities.

Your answer and feedback is extremely valuable, so please take a moment to answer this survey. All answers will be handled anonymously. The survey is open until 30 November 2020.

A big thank you in advance for your time!

Grade

1. Partner
2. Director
3. Senior Manager
4. Manager
5. Senior Associate
6. Associate
7. Other

Line of Service

1. Assurance
2. Tax & Legal
3. Advisory
4. PCS

Office location

1. Helsinki
2. Hämeenlinna
3. Jyväskylä
4. Kuopio
5. Lahti
6. Lappeenranta
7. Maarianhamina
8. Oulu
9. Rovaniemi
10. Seinäjoki
11. Tampere
12. Turku
13. Vaasa

I have following yearly goals relating to sales and client leadership (you can choose more than 1)

1. Client revenue target
2. Business unit / team revenue target
3. Personal revenue target
4. Participating in a certain number of offers
5. Developing an integrated solution
6. Developing a focus account
7. N/A / I am not sure

Sales culture and transformation

This section covers a few questions dedicated to sales culture and transformation at [the company]. In this section we want you to focus on the aspect of culture transformation and client leadership in terms of the Salesforce tool.

Please answer the questions below truthfully and provide examples. Your answers and feedback are extremely valuable and will be handled anonymously.

1. It has been clearly communicated to me and I understand why Salesforce was introduced to use in [the company]
 - i. Strongly disagree
 - ii. Disagree
 - iii. Neither agree nor disagree
 - iv. Agree
 - v. Strongly agree

Why? What do you assume were the reasons behind it? (open question)

2. The deployment of Salesforce has made me focus more on sales and client leadership
 - i. Strongly disagree
 - ii. Disagree
 - iii. Neither agree nor disagree
 - iv. Agree
 - v. Strongly agree

Why/why not? Please give an example (open question)

3. I am motivated to use Salesforce for registering my sales activities and opportunities
 - i. Strongly disagree
 - ii. Disagree
 - iii. Neither agree nor disagree
 - iv. Agree
 - v. Strongly agree

Why/why not? Please give an example (open question)

4. I have received enough support and training during deployment of Salesforce, and I know who I should contact for help
 - i. Strongly disagree
 - ii. Disagree
 - iii. Neither agree nor disagree
 - iv. Agree
 - v. Strongly agree

Why/why not? Please give an example (open question)

5. I have noticed a change in [the company] culture in terms of sales and client leadership since Salesforce was deployed
 - i. Strongly disagree
 - ii. Disagree
 - iii. Neither agree nor disagree
 - iv. Agree
 - v. Strongly agree

How? Please give an example (open question)

6. I have noticed a change in my own ways of working and thinking in terms of sales and client leadership since Salesforce was deployed
 - i. Strongly disagree
 - ii. Disagree
 - iii. Neither agree nor disagree
 - iv. Agree
 - v. Strongly agree

How? Please give an example (open question)

7. Overall, how do you feel about the sales culture transformation at [the company]? Why?

Sales activities and opportunities

This section covers a few questions dedicated to sales activities and opportunities and we want you to focus on your use of Salesforce tool.

Please answer the questions below truthfully and provide examples. Your answers and feedback are extremely valuable and will be handled anonymously.

8. I know how to use and I utilise Salesforce for registering my sales activities and opportunities
 - i. Strongly disagree
 - ii. Disagree
 - iii. Neither agree nor disagree
 - iv. Agree
 - v. Strongly agree

Why/why not? (open question)

9. Please estimate how long it take for you to
1. Create an opportunity in Salesforce
 - Less than 5 minutes
 - 5-10 minutes
 - More than 10 minutes
 - N/A (I haven't done this myself so far)
 2. Create a sales activity (e.g. a client meeting) in Salesforce
 - Less than 5 minutes
 - 5-10 minutes
 - More than 10 minutes
 - N/A (I haven't done this myself so far)
 3. Create a client contact in Salesforce
 - Less than 5 minutes
 - 5-10 minutes
 - More than 10 minutes
 - N/A (I haven't done this myself so far)
 4. Create an account (i.e. client) in Salesforce
 - Less than 5 minutes
 - 5-10 minutes
 - More than 10 minutes
 - N/A (I haven't done this myself so far)
10. I have continued using emails instead of Salesforce chatter for managing my sales activities together with my colleagues
- i. Strongly disagree
 - ii. Disagree
 - iii. Neither agree nor disagree
 - iv. Agree
 - v. Strongly agree

Please explain in a few words why (open question)

11. Registering and managing my sales activities and opportunities in Salesforce is more efficient as opposed to how I processed them earlier
- i. Strongly disagree
 - ii. Disagree
 - iii. Neither agree nor disagree
 - iv. Agree
 - v. Strongly agree

Why/why not? Please give an example (open question)

12. Please give an overall grade between 1-5 to Salesforce as the tool for managing your sales activities and opportunities

- i. Unsatisfactory
- ii. Sufficient
- iii. Satisfactory
- iv. Very good
- v. Excellent

13. I regularly maintain my client contacts in Salesforce and feel it is important to keep them up to date
- i. Strongly disagree
 - ii. Disagree
 - iii. Neither agree nor disagree
 - iv. Agree
 - v. Strongly agree

Why/why not? (open question)

14. The deployment of Salesforce has helped me increase xLoS cooperation e.g. by involving my [company] colleagues when interacting with clients
- i. Strongly disagree
 - ii. Disagree
 - iii. Neither agree nor disagree
 - iv. Agree
 - v. Strongly agree

Why/why not? Please give an example (open question)

15. Information visible in Salesforce has helped me to have better conversations with client contacts
- i. Strongly disagree
 - ii. Disagree
 - iii. Neither agree nor disagree
 - iv. Agree
 - v. Strongly agree

Why/why not? Please give an example (open question)

16. Information visible in Salesforce has helped me to have better conversations internally with colleagues
- i. Strongly disagree
 - ii. Disagree
 - iii. Neither agree nor disagree
 - iv. Agree
 - v. Strongly agree

Why/why not? Please give an example (open question)

Open for further comments/feedback e.g. regarding sales culture transformation, sales activities or Salesforce. The floor is yours: