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SALES PROCESS MANUAL FOR SALES NEGOTIATORS

– case MML-Group

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BACHELOR'S THESIS | ABSTRACT

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SALES PROCESS MANUAL FOR SALES NEGOTIATORS
- CASE MML-GROUP

Sales are one of the key functions needed for a business to run. The whole operation and its processes have to be fluent and efficient so that the resources spend to it bring the maximum profit back. The work of the sales negotiators and salesmen in a company are in vital role in making the profit for the company – and making them in as efficient way as possible.

MML-Group is a company that functions in the fields of human resource services and tool retailing. This research study was realized as an action research with the purpose of documenting the sales process and its sub processes in the case company and when needed, improving them. The documentation and the improvement actions were then used to create a sales process manual that will accelerate and standardize the work of the sales negotiators as well as the company as a unit.

The data and information of the sales negotiator's work and the case company were collected during an internship period in the case company in order to get a holistic perspective to both the work and the working environment of the sales negotiators. In addition, literature from various sources was used to build a theoretical base for the study.

The main result of this study was the sales process manual for the sales negotiators of the case company. The manual was put into operation immediately and it was used in the induction process of a new sales negotiator.

The sales process manual was designed to be continuously maintained and updated so that it could benefit the company also in the future and even be used as a model for other process manuals of the company.

Due to the non-disclosure agreement, the manual is not attached in this thesis.

KEYWORDS:

Sales process, sales manual, sales negotiator, sales process manual

OPINNÄYTETYÖ (AMK) | TIIVISTELMÄ

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MYYNTIPROSESSIKÄSIKIRJA MYYNTINEUVOTTELIJOILLE - MML-GROUP

Myynti on yksi liiketoiminnan pyörittämisen avaintoiminnoista. Myynnin ja sen prosessien täytyy olla sujuvaa ja tehokasta, jotta siihen käytetyt resurssit tuovat maksimaalisen voiton. Myyntineuvottelijat ja myyntihenkilöt ovat tärkeässä asemassa yrityksen tulojen hankkimisessa – ja sen tekemisessä mahdollisimman tehokkaasti.

MML-Group on yhtiö, jonka toiminta koostuu henkilöstöpalvelujen tuottamisesta ja työkalujen jälleenmyynnistä. Tämä tutkimus toteutettiin toiminnallisena tutkimuksena, jonka tarkoituksena oli dokumentoida ja tarvittaessa kehittää myynnin prosesseja ja alaprosesseja kyseisessä yrityksessä. Dokumentoinnin ja kehitystoimien pohjalta luotiin myyntiprosessikäsikirja, joka nopeuttaa ja standardoi sekä myyntineuvottelijoiden työtä että koko yhtiön yhtenäistä toimintaa.

Myyntineuvottelijoiden työhön sekä kohdeyrityksen toimintaan liittyvät tiedot kerättiin työharjoittelujakson aikana, jotta myyntineuvottelijoiden työhön ja työympäristöön saataisiin mahdollisimman kokonaisvaltainen näkökulma. Tämän lisäksi tutkimuksessa hyödynnettiin useista eri lähteistä hankittua kirjallista materiaalia teoriaosaa varten.

Tutkimuksen lopputulos oli kohdeyrityksen myyntineuvottelijoiden myyntiprosessikäsikirja, joka otettiin käyttöön heti: sitä hyödynnettiin uuden myyntineuvottelijan perehdytysprosessissa.

Jotta yhtiö voisi hyödyntää myyntiprosessikäsikirjaa myös tulevaisuudessa, sitä täytyy ylläpitää ja päivittää säännöllisesti. Käsikirjaa voidaan käyttää myös mallina yhtiön muissa prosessikäsikirjoissa.

Salassapitosopimuksen takia käsikirjaa ei ole liitetty tähän opinnäytetyöhön.

ASIASANAT:

Myyntiprosessi, myynnin käsikirja, myyntineuvottelija, myyntiprosessien käsikirja

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LIST OF ABBREVIATIONS (OR) SYMBOLS

(Write a list of symbols or abbreviations here. If you do not use a list of abbreviations or symbols, remove this page. Use the "Abbreviations or symbols" text style when you write the list.)

BtoB	Business to business
CEO	Chief executive officer
CRM	Customer Relationship Management
NDA	Non-Disclosure Agreement

1 INTRODUCTION

1.1 Background

Every business unit has its certain mode of operation and code of practice. In the sales department, in order to be an efficient and effective sales negotiator, it is crucial to both know the technical part of the sales as well as the processes and practices related to it.

I completed my work practice period in MML-Group, a diversified company that functions both as a tool reseller and also provides human resource services. During the work practice period, I was offered to create a sales process manual for the sales negotiators of the company. Since I had already collected large amount of information regarding to the company's ways of functioning, it was an outgrowth to continue the work.

During the work practice period, I acted as a human resource assistant / sales negotiator. The material of the manual would be collected through my own experiences as well as by interviewing and discussing with the members of the staff.

1.2 Thesis objectives

The main objective of the thesis is to create a guidebook for the sales negotiators of the case company. The guidebook focuses on all the processes and procedures that are included in their work from new customer acquisition to sales and invoicing. Due to the Non-Disclosure Agreement (NDA) between the writer of the thesis and the commissioner company, the detailed structure of the guidebook will not be presented.

The original objective was to concentrate on sales process and its sub processes, but since the supportive processes enable the effectiveness of the sales negotiator’s work, it became reasonable to include also some of the main supportive functions, such as reporting, in the guidebook.

The creation of the guidebook will in addition contain carefully observation of the sales processes as well as the processes supporting the sales in order to fractionate the procedures into a compact funnel of processes and also, if regarded necessary, to improve them.

The guidebook focuses on processes, which are continuous and repeatable. This is separated from the project management, where every project has its unique profile.

The research objective focuses on how the CEO and the sales manager of the firm see the role of a sales negotiator in the company. In addition the manual takes into account the views of the sales negotiators. This kind of practice will prevent the sales manual to become theoretical rather than usable and functioning in practice.

1.3 Research questions

The research questions are divided into three main groups: process management, sales processes and creating an organizational manual. The first question is to determine what a process is and how processes can be managed. The difference between process and project is determined and the process management will be discussed with an overall view.

The second question concentrates on sales work and its processes. The processes and parts of it are carefully explored and divided, and the focus will be in documenting them in clarified and improved form. Also, the supportive processes that bring value to the action of sales negotiators are researched.

Thirdly, the creation of the process manual / sales process guidebook for the sales negotiators will be studied from the viewpoint of how it will be constructed and how it can facilitate the work of the sales negotiators as well as what risks the usage of the manual may have.

1.4 Thesis structure

The form of the thesis is an applied thesis, since the result of it, the sales process manual has been created tailor made for the MML-Group and the sales negotiators of it. The purpose of an applied thesis is to provide findings that have practical relevance and value both to the managers of the company and the employees, understand and act upon them (Saunders et al 2007, 8-9). In the case company, the value is allocated not only to the sales negotiators but also the managers. The thesis thus concentrates on fulfilling the specified needs of a certain principal and provides more practical rather than theoretical outcomes.

The thesis is structured to present firstly the methodology behind the research. After, the literature and theories related to both process and process management as well as the sales and sales management are viewed in general. The meaning of the manual is discussed in chapter 5.2. The case company of the thesis and the writing process of the manual are presented more in detail in the chapter 6.

The process manual is gathered as an action research, which aims to go beyond the qualitative research and influence the actions of the company (Kananen 2011, 149). Therefore the main output of the thesis is the process manual. Due to the non-disclosure agreement it cannot be published within the thesis.

2 METHODOLOGY

2.1 Literature review

As stated in the chapter 1.4, the three main points of view of the thesis were process management, sales processes and process manual. These three subjects were researched separately and, as much as possible, combined, and linked to each other during the thesis writing process. The intent of the research was to build an overall background for the writing process of the manual for the sales negotiators in the case company.

In order to cover the reliability of the research, the literature material collected was carefully discussed and weighted: the sources had to be generally accepted and reliable as well as up-to-date and create variety. The main sources of the literature were secondary literature such as books as well as primary literature including the company's internal materials such as induction material of the case company and other theses with similar topics (guidebook for sellers, new employees manual). The consistency of interpretation was used to increase the reliability and validity of the research results.

2.2 The decision of the methodology

The research study of the case company was done by using qualitative research methods. The methods were divided into three categories: the observation, interviews and literature review. The qualitative research approach was chosen because of the nature of both the case company's size and structure and the thesis process: it was natural for the writer of the thesis to conduct the observation during the work practice period and interview the managers of the company as well as have discussions with the sales negotiators.

Since the form of the research is an applied research, which addresses to concentrate on issues that are pointed out by the managers, the findings are presented in such an applied way that enables the results to be put into operation directly after the research process. (Saunders et al 2007, 7). The action research will produce the process manual in order to record and straighten both the core and support processes linked to the work of a sales negotiator (see Figure 1).

2.2.1 The definition of the subject

Fulfilling the needs of the case company was the major goal of the thesis. Thus the extension and the level of detailed information of which the manual would operate were determined as one of the first characters of the research. Though process management is often connected to quality management and measuring the processes, the main purpose of research was to document the processes of the sales negotiator and transform them into clear and easily understandable form.

The selling techniques were excluded from the manual because the purpose of the manual was not to tie the sales negotiators and prevent them to function and create their own manner of selling. Therefore the processes were divided and illustrate as far as the guidelines of the company go.

The main difficulties/obstacles of outlining the topic were in two levels: the amount of fields of action to be included in the manual increased from the main processes of the sales event to cover also the support processes such as the office routines. Determining the particularity of the processes was also difficult since the difference between descriptive and guiding versus too restrictive manner is quite small.

2.2 Collection of the data

The data for the process manual was collected by using qualitative research methods. The main three collection methods were observation, interviews and discussions and literature review. The three way approach of the topic was crucial in order to fulfill both the needs to base the research on theoretically approved material as well as concentrating on the case company and its particular features. It was a descriptive research with a purpose to observe the phenomenon, in this case the sales and other processes and write it down. (Sanders et al. 2007, 134).

2.2.1 Observation

In action research the observation of the examined phenomenon is a crucial part of the research, since the researcher is actually involved in the phenomenon in authentic context and is thus capable of actively collecting and simultaneously processing the collected firsthand information (Kananen 2011, 48, 49, 150). Compared to quantitative research method, where the aim of objectifying the information is crucial, qualitative methods are more allowing to the reactivity of the researcher, which in this case study is particularly desirable (Kananen 2011, 49).

In the case company, the researcher's identity as a participating researcher was clearly informed to the employees and management level of the company. The role of participant as observer involved gaining the trust of the group, e.g. inside the company, which again enabled the interviews and asking questions for every employee to be more realistic. (Saunders et al. 2007, 288, 605).

2.2.2 Interviews

Focused individual and group interviews, concentrate on themes in order to cover all the components such as factors, actors and processes of the phenomenon. The goal of those interviews is to understand the phenomenon as thoroughly as possible by exploiting and using the cumulation of the themes and questions: the answers of the interviewees lead to new ones thus providing the interviewer new angles and detailed information of the phenomenon. (Kananen 2011, 54).

In the case study, the second state of the research was conducted partly simultaneously and overlapping with the observation. The CEO and the sales manager were individually interviewed several times in semi-structured interviews, since the themes and questions were covered according to the themes of the process manual. The purpose of giving space and time for open discussion and additional themes was to fulfill the needs of the company concerning the process manual. During the writing process of the manual, the emphasis of the interview was changed from informant interview, where the themes of the interview are guided mostly by the interviewee, to respondent interview, in which the interviewer directs the interview (Saunders et al. 2007, 312). The interviews were organized in the office of the company and followed by email discussion.

2.2.3 Group interviews and discussions

Group interview is a form of an interview that is usually conducted on non-standardized basis involving two or more interviewees. In focus group interview, the interview focuses on earlier determined issue or topic and aims to encourage the participants, which have been selected due to their common characteristics, actively discuss upon the topic. The interviewer acts as a moderator or the facilitator of the group, controlling the boundaries of the topics and at the same time encouraging the interviewees to present their own points of views without the pressure of reaching a consensus. (Saunders et al. 2007, 339-340).

The challenges of group interview are related mainly to gaining the trust of the interviewees and enabling/encouraging their participation in the data collection process. If the interview situation involves employees and their superiors, the opinions and addresses may be affected by the presence of the other party. Also, the information collected is ‘consolidated’ rather than collected from individuals (Kananen 2011, 52).

2.3 Reliability and validity

If the research for this thesis were repeated by other researcher, it would lead to consistent findings and similar observations. Of course, since the case company is rapidly developing and growing, there would be most likely be some changes in the factual content. According to Saunders et al. this and the transparency of creating answers from the data collected are the characters that measure the reliability of the research (Saunders et al. 2007, 609).

The validity of the thesis is measured by observing how the data collection method measures what they were supposed to measure (Saunders et al. 2007, 614). The validity of this thesis and the research done for it is high because of the wide resource of information used for it, as described in the chapter 2.2.

The issue hindering the reliability of the thesis research was the fact that the researcher worked in the case company during the research. Though the observation gave a great amount of data to interpret, the interpretations were always checked by the CEO and, during the final group discussions, by the sales negotiators and the sales manager of the company. By this, the reliability of the study was increased.

The validity of the thesis was also in question due the position of the researcher. Therefore the verifying done by the personnel of the case company, especially by the CEO, as well as the literature review of the studied phenomenon helped to maintain the validity of the research.

To increase the reliability and the validity of the thesis research, some advices from the book by Mr. Kananen were used. The reliability and validity aspects were already taken into account during the planning of the thesis to ensure those aspects to be fulfilled in the research process. The documentation of the research stages increased the credibility of the thesis and the document was used especially to validate the decisions and choices made during the research. Finally, the research material was read and interpreted several times by the CEO of the case company. Also the sales negotiators of the company read the process manual and commented on it. By this the research results and the interpretations made by the researcher were carefully investigated to state the validity of the research. (Kananen 2011, 66-69)

Though generalization of the research is not the main aim of the qualitative research, this research could be executed in other companies as well (Kananen 2011, 68). What comes to the sales process manual, it could be used as a general guide in most of the business to business companies. The detailed content of the manual could be used in companies that operate in similar fields of business, in human resource services and tool retail. Due to the non-disclosure agreement, this is though highly unlikely to happen.

3 WHAT IS A PROCESS

3.1 The definition of a process

Business and the units of it consist of operation functions with the main purpose of producing the products or services (Slack et al. 2009, 2). Operations are routines that are divided to various separate and overlapping processes, which all have a defined role in executing the operations. According to Slack et al. a process is ’an arrangement of resources that transforms inputs into outputs that satisfy internal or external customer needs’ (Slack et al. 2009, 4). Since the processes may comprise also bigger completeness’, they are often divided into sub processes (Slack et al. 2009, 5).

Processes are part of operations as well as the projects. The terms operation and process are often confused with the term project. A project is always a unique wholeness with a clear start and ending points. According to Laamanen and Tinnilä, it is a realization of a process, aiming to fulfill certain, often beforehand determined objectives. A project often involves processes, but still remains unique and unrepeatable. (Laamanen & Tinnilä 2009, 65-66). An operation as well as a process is cyclical, repeatable action with often unspecified beginning and ending. A process is also usually customer-driven and measured as variation of the process rather as deviation from the plan, which is the measurement of a project performance (Laamanen & Tinnilä 2009, 65; Thomsett 2002, 2).

3.2 identifying the key processes

Identifying the key processes of the organization and further the process management are the answers to the need of using the potential of the personnel more efficiently. By describing and constantly improving the vital processes create value for the customer, which is one of the main competitive advantages for the company. (Laamanen & Tinnilä 2009, 48).

According to Laamanen and Tinnilä the main business processes can be divided into core processes and supportive processes (see picture_). The first group features processes such as customer commitment and order fulfillment whereas the latter group consists of the background processes from planning of the business to the maintenance of information systems. (Laamanen & Tinnilä 2009, 123).

In the case company, the core operations are strongly related to the sales of the products and services. The processes of these operations are introduced in the sales negotiator's manual in the first section, which consists of the sales funnel from prospecting potential customers to invoicing and after sales. In order to support the sales, the company has processes such as running the office, which is presented in the manual as well as reporting process.

Figure 1. Examples of core and supportive processes in the organization (Laamanen & Tinnila 2009, 123).

Creating and dividing the processes often causes difficulties. The processes and projects can become too complicated and wide and thus lead to losing their main function, which is to efficiently convert inputs into outputs (Laamanen 2009, 19). Also, too detailed modelling may lead to tying the hands of the employees and thus strengthening the rigidity rather than innovativeness and customer-oriented approach (Laamanen & Tinnilä 2009, 53).

3.3 Process management

Process management is an area that every business from SME's to consolidated corporations should be paying careful attention to. Customer Relationship Management (CRM) and sales cycle (see page Picture_) are good examples of systems that include various processes and sub processes that have to be run efficiently in order to support the business making process. Every part of the process supports another and the process cannot be carried out or even progress without the preceding part completed (Laamanen 2009, 19).

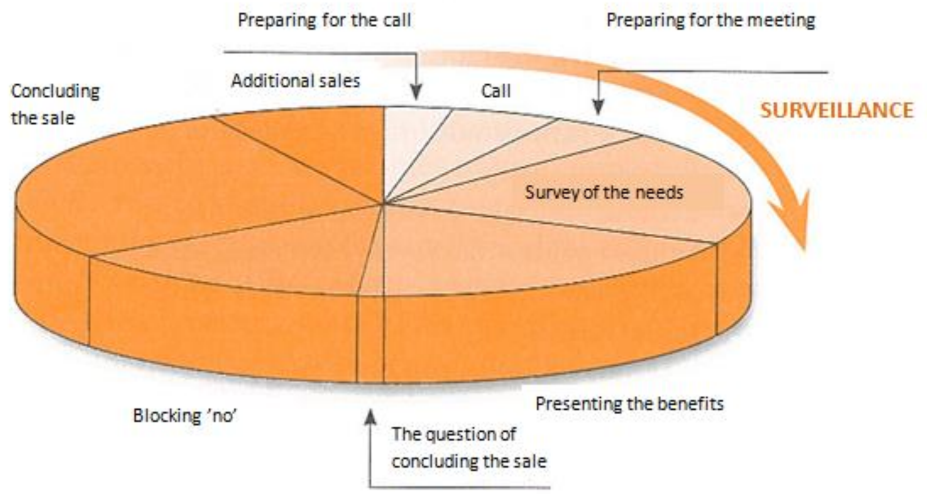
4 SALES WORK

4.1 Sales process

A company producing products and/or services for a customer would not run if there were no-one to take care of the selling. Whether the sales are handled by the CEO or any other employee of the company, it has to be done for the existence of the company. (Vuorio 2008, 10). The definition of sales has also a viewpoint from the customer's side: selling is the way to fulfill a customer's wants and needs by finding the most suitable solution to match the customer's starting points. (Alanen et al. 2005, 14).

Selling is a broader interaction event which is not limited to the short encounter with a sales person and a customer. According to Vuorio, the most demanding tasks of the whole selling process start from prospecting, i.e. finding the potential customers (Vuorio 2008, 10). Without proper pretrial review, all the way down to creating the environment that enables the selling, any kinds of sales have smaller probability to succeed and lead to the wished outcome: the trade.

Before the result the sales person has to go through, depending on the field, multiple sub processes which all are connected to the main process, the selling (see picture 1) Completing the sales process is crucial in the case of every single customer, not only with the potentially seen customers. The sales process has to be of uniform quality and proceed logically (Rubanovitsch & Aalto 2006, 35).



Picture 1. The circle of sales, translated from Myynnin ympyrä (translated from Rubanovitsch & Aalto 2006).

As the picture above shows, selling process is a continuing cycle, which starts from preparing for the call and goes even beyond concluding the sale to possible additional sales. Though the fact, that achieving new customers often burns more resources than satisfying the old one, continuing the sales process, i.e. starting a new round in the circle of sales is commonly known stumbling block among both the sales persons and their managers.

4.2 The ways of selling in business to business

In business to business selling, the sales person has to create a confidential relationship between the participants of the sales process. Compared to business to customer sales, where the purchase often occurs only once and even spontaneous and the decision of purchase is done by an individual, in BtoB (business to business) sales the process often contains a group of decision makers. Despite this the selling is personal and happens between people. Therefore the selling techniques, the personality of the seller and the buyer as well as the reputation of both the parties affect the buying decision as much or even more than in BtoC (business to customer) selling. (Rubanovitsch & Aalto 2006, 20)

The commons ways to make sales in BtoB are via phone call and/or face to face meeting. Both situations are 'live' and require the seller to dominate comprehensively firstly the selling process as well as the products and/or services the company represents (Rubanovitsch & Aalto 2006, 21). Because of the variety of the customers, every selling action is different. The seller has to adapt into new scenarios and offer the service the customer needs in that particular situation (Rubanovitsch & Aalto 2006, 144). To be prepared for the possible situations, the sales process manual becomes an efficient supportive tool. The usefulness of the sales process manual in supporting the sales negotiator will be discussed further in chapter 5.

Regardless of the media or the position of the sales maker, every sale means finding the customer, finding out his needs and fulfilling them with an agreement that benefits and satisfies the both sides of the deal. As stated in the thesis of Mauri Honkanen, compared to other business processes, the detailed description of a possible sale is impossible due to the fact, that every customer contact is unique (Honkanen 2011, 1). Still it is important for both the sales negotiator and the management level of the company to see and adopt those same elements that repeat in the selling process.

4.3 Selling theories

Selling is influencing to the customers decision in a way that leads to a purchase. The theories of rhetoric that were used for hundreds years mainly by the orators and to educate skilled talkers in e.g. politics, are now often used as ground basis to guide a seller in his sales work, to increase his skills in influencing the customer. When approaching the theories of marketing and sales, the customer is though becoming more and more recognized: in AIDA-model, the stages are named from the customer's point of view, from attention to action (Figure 2) (Vuorio 2008, 14-18).

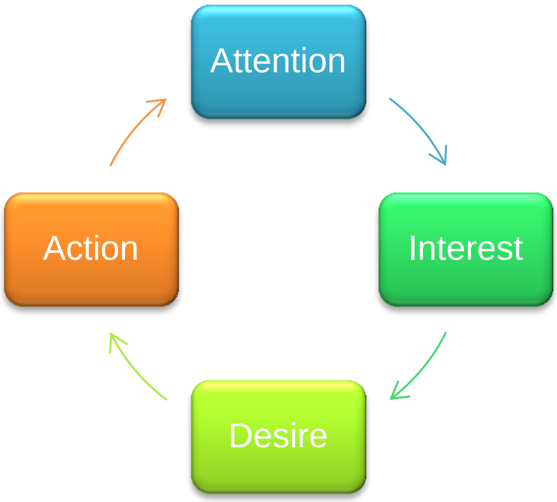


Figure 2. AIDA-model (adapted from Vuorio 2008,15).

5 THE SALES PROCESS MANUAL

5.1 What is an organizational manual

An organizational manual is a package of collected information to be used by the employees of the organization. It can focus or be made for certain parts of the organization from sales department to financial for certain employees or it can cover the whole organization to help every employee to complete his work efficiently and by using the common rules. It is written uniquely for the organization and should grow and be updated along the changes and growth of the organization. (Tripathi 2010, 1-2)

Because of its uniqueness, the manual can feature various kind of material from organizational charts and policy statements to process description, standard instructions and hands-on information; whatever is seen relevant to be mentioned in the manual (Tripathi 2010, 4). Despite its unique character, some common factors can be seen among the guidebooks of the same field of business: regardless of the area the sales procedure usually advances from approaching the customer to after sales.

5.2 The purpose of the manual

The manual plays a vital role in today's growing amount of the businesses that require from their employees a carefully performed and efficient work as well as multitasking in complicated world of multiple procedures, operations and office practices. It functions as the guide for both new and old employees, from a supportive tool of an induction process to note- or reference book for longer term employers, not forgetting the management level (Tripathi 2010, 4). It is the media used to communicate and transfer, as well as store and act upon, the vital information of the company (Tripathi 2010, 3). It can be called as the process library, where all the process-related documentation, workflow blueprints and process charts are stored (Graham 2004, 10).

The organizational manual has value for every employee of the company. In the case company, the process manual was created firstly for the sales negotiators, but is an important and practical tool also for the management level. It has been used to support the induction process of a new sales negotiator and to update the practices of the older employees to unify the whole sales operation and the processes of it.

5.3 Possible threats

Every written material can be interpreted variously depending on the reader. If the organizational manual is read word to word, without any questioning, it may actually harm and slow down the actions or work of the reader as an employee. As it best, the manual will support and benefit the work of the employee rather than make him waste time on fulfilling the guidelines of the manual literally and as detailed as possible. In addition, if searching the needed information from the manual requires unnecessary amount of time, the manual loses its purpose of accelerating the operations. The manual thus has to be written to be understandable and easy to read; detailed enough but leaving space for the expertise of the employee. (Tripathi 2010, 43-44)

If the manual is not continuously updated, it becomes useless and can even provide wrongful guidance. Acting with outdated information can cause risk to the operations of the employee as well as to the whole company. Thus the manual has to be written in the first place to be easily improved to meet the current courses of action and rules of the organization. In electronic form the manual is easier to update and, to increase the accessibility of the updated version it can be stored in intranet to be read in every location with an internet connection. (Tidwell 2000, 75-76). The manual should also have a gatekeeper, the process manual manager, who is responsible for updating the manual and assisting the access to it (Graham 2004, 10). In the case company, the CEO of the company became the person in charge of the manual.

The implementation of the manual has to be carefully conducted to avoid misapprehensions and misusing of the manual. Though one of the purposes of the manual is to guide the actions of the employees and sometimes restricting their freedom of acting, it is done *for* the employees, not against. This also applies to the writing process of the manual: the content has to be designed according to its users and their needs, however with an eye on the needs of the owner of the manual, usually the management level of the organization.

6 THE DOCUMENTATION OF THE PROCESSES

6.1 The purpose of the documentation

In order to write a process manual that encompasses all the crucial information of the sales negotiator's work, there has to be a proper collection process of the needed information. The information collection phase, in this case study the documentation of the sales negotiator's work, determines how valid and usable the manual is.

The documentation of workplace expertise, as well as the organizational performance diagnosis, provides a strong basis for improving the performance of the organization, its processes, team and workers (Swanson 2007, xiii).

Workplace expertise is seen as 'the fuel of an organization' and it can be divided into general and specific expertise (Swanson 2007, 125). In the case company of this thesis, the information collected included both types of the expertise: part of the processes were general and known by all the workers of the company, the other part included processes that needed the specific expertise of the sales negotiators.

The reasons behind the need of improvement may be for example complaints from the workers or the customers of the organization, lack of both time and cost resources or high rate of errors. Though, improvement is not the only reason for the documentation. It can also act as a review to meet for example certification requirements, or simply give the management level better understanding of the processes of the company (Graham 2004, 17)

6.2 The process documentation as a project

In the traditional method, the documentation project produces only one type of document at a time. Another kind of method, the single sourcing method is based on modular writing in which the writer "evaluates the content, breaks it into the smallest possible modules, labels the modules by content type, configures the modules into meaningful hierarchies and links the hierarchies to related hierarchies" (Ament 2007, 23). In the case study, those two methods were mixed and used in order to create very detailed collection of processes and sub processes.

6.2.1 The initiation of the project

The process documentation project starts from an initiative that can be done by any member of the organization. After the identification of the process or processes, the process owner, the executive in charge of the processes involved, initiates the documentation project. He is in charge of establishing objectives and scope for the documentation project and approving any changes to the documented processes. In addition, he makes the formal announcement to the people involved in the processes.

The announcement includes the description of the objectives and scope of the project and the introduction of the facilitator i.e. the writer of the documentation. The process owner also asks for support and offers support and encouragement. After the initiation of the documentation project, the process or processes are named, their results are identified and the collection of the information can start. (Graham 2004, 17, 18)

6.2.2 The collection of the information

The collection of the information or the 'fact gathering' as Graham states (2004, 23) is the phase, where the writer of the documentation observes the work of the employees involved in the processes, interviews them and the management level of the company, and makes notes accordingly. (Graham 2004, 19).

The observation of the work is a situation, where the employees may feel uncomfortable: the facilitator is carefully following every step of the work and taking notes. The interviews of the employees and managers have to be conducted so that the interviewees feel safe and they are willing to discuss the processes openly and thoroughly. (Graham 2004, 23)

In both situations, in addition to the facilitator, the process owner has a major role. The announcement made during the initiation phase has to assure the employees that the documentation project will not cause them for example the loss of employment – quite the contrary their contribution to the project is highly appreciated. By explaining the objectives of the project and encouraging the employees to put some time into the project, the process owner will pave the way for the facilitator. (Graham 2004, 23)

In the case study, the operations of a sales negotiator were observed during the work practice of the writer. The fact, that the writer was an actual part of the personnel as well as the proper announcement eased the information collection phase.

The employees of the company as well as the CEO and the sales manager of the company were interviewed and several discussions regarding to the content of the manual were performed during and after the observation phase.

The documentation of the interviews was done straight into the versions of the process manual as far as possible, and by taking notes. This form of documentation enabled the interviews to be more discussion-like and the results could be seen immediately in the process manual. Thus, part of data analyzing was conducted already during the interviews.

6.2.3 The conclusion of the project

When the collection phase is completed the processes are charted, validated and approved. The process chart presents the processes and their parts in simple hierarchical form that shows not only the processes step by step but also the relationships between them. (Graham 2004, 29) There are various types of process charts that can be used, depending on the extent of the processes and the field of operation.

According to Graham, when the processes are validated and approved by both the process owner and the management level, the process charts are stored in a process library. In order to keep the library useful for the organization and its employees, a library manager is named to take care of the maintaining and up-dating of the library and its process charts. Since the library though has no val-ue without users, the library manager has to also take care of informing the members of the organization about the library and how to use it. (Graham 2004,153)

7 CASE STUDY

7.1 Case company – MML-Group

MML-Group consists of two firms: MML-Resources Ltd, which provides human resource services, and MML-Imports Ltd., which imports tools and material especially needed in the building field of business. The first firm was established in 2007. During the years 2009-2010 the firm expanded to tool and material procurement firstly especially for the railway building and maintenance and thus MML-Imports was established. (Memonen 2011, 6).

The slogan of the MML-Group is ‘Tools and Doers’, which indicates to the aim of providing required tools and materials as well as the human resources from the same company. This way the company will serve its customers with fulfilling their needs in multiple aspects at the same time.

During the thesis writing process MML-Group employed fewer than 10 permanent workers, of which the majority worked as sales negotiators. All the sales negotiators function in both MML-Resources Ltd and MML-Imports Ltd, which requires the knowledge of both business fields with its several products and services and especially, the processes linked to both sales and supporting it.

Before the thesis process, there was no particular guidebook for the sales personnel. The personnel was inducted via training and educated when needed. There was however a need for a book that would gather all the crucial information of the work of the sales negotiators.

7.2 The environment of the sales negotiator

The sales negotiators of the case company function on their own territories, being responsible of their own sales and expenses. The geographical sphere of operations of the sales negotiators can be wide and thus increase the independent workload during the working time. Because of the dual company form,

the sales negotiators have to be multifunctional and handle the sales, the customer service, the delivery of the products as well as the recruitment and other processes of human resources at the same time.
The sales negotiators meet in regular meetings which maintain and increase the uniformity of their actions. The threat is that all the information shared during those meetings will not be memorized at once. Going through meeting minutes to find a certain change in a certain process can be time-consuming and frustrating, when all the information could be collected and found in an organized form, a guidebook. Though the company uses a CRM software and weekly reporting system, it did not answer the need of having uniform modes of operation clearly written down.

7.3 Creating the process manual

7.3.1 The need for the manual

The idea of the process manual was given by the CEO of MML-Group. The main reason for creating it was to compile the sales process and its sub processes into one guidebook every sales negotiator would follow. The guidebook would enhance the work of the sales negotiators by providing all the information needed to go through the sales process from approaching a customer to invoicing and after sales.

There was also a need for the process manual due to some differences in the way the sales negotiators worked considering for example the maintaining of the relationships with the customers and the leased workers of MML-Resources. Consistent course of actions would secure the quality of the customer service and thus increase the positive marketing of the company and its services to customers as well as to the suppliers of the products and the applicants for the leased work.

7.3.2 The writing process

The writing process of the sales process manual started in August 2012. The first part of the process was to create the framework for the research topic, the processes to be included in the manual. The topic was decided to be limited in sales processes, since the variety of the operations and processes done by the sales negotiator extended in such amounts that it had been too wide subject for a thesis. This defining of the subject was done in co-operation with the CEO of the company since he was the person responsible for instructing the writing of the manual.

After setting boundaries to the topic, the sales processes of the company were documented by using the knowledge collected during the work practice period from February to August 2012, as well as by interviewing and discussing with both the CEO and the sales manager of MML-Group. A notebook and a work practice diary that were used during the six month work practice period were used as primary data sources to reveal the output of the observation. The content of the interviews was documented as notes and direct changes to the draft of the manual.

Working as a sales negotiator in the case company enabled to emphasize the information that is the most valid for the sales negotiator. The data collected was thus filtered for the process guidebook. Compared to the model of organizing process management from the top, the approach of the research from the bottom to top benefitted the whole company. The work of the sales negotiator was carefully observed. As the result, both the composed sales processes and supportive processes were repeatedly gone through by the CEO, the sales manager and the sales negotiators of the company, in shred and separated discussions, which were be presented in the chapters 2.2.2 and 2.2.3.

The first form of the draft was a collection of process charts from general sales process circle to more detailed process charts. The possibility of using a flow chart as a form to present the processes was dismissed to keep the manual and its charts easy to read and understand without an education of the symbols of flowcharts.

The pace of the writing process was bipartite: the results of the observation and the processed data of it were discussed mainly with the CEO. The draft was then improved and changed according to the suggestions made by him. The continuous revision sessions with the CEO ensured the validity and reliability of the manual. It was, after all, crucial to embody only correct and current content in the manual. When needed, the information was collected and the content of the manual were discussed with the sales manager.

During the interviews and discussions, the breadth of the sales process manual was extended in two ways. In addition to sales processes, some supportive processes such as reporting processes and office processes were included in the manual. The processes and their different stages were to be elaborated further than discussed beforehand. These changes to the structure of the manual lead to extending the writing process.

7.3.3 The implementation of the manual

During the time the sales process manual was at the end of fine-tuning, MML-Group hired a new sales negotiator. Since the manual was already been revised several times by the CEO and also the sales manager, it was rather risk-free to present it to the new employee. The process manual was thus given to the new sales negotiator to support his induction into the work. According to his feedback the process guidebook helped to assimilate and understand the information and knowledge related to the work of the sales negotiator. He used the guidebook also after the induction period to check the practice of the firm and the work itself.

At the same time, the other sales negotiators were also provided the access to the sales manual. They were encouraged to read to test its intelligibility and suitability for their work. In total, both the sales negotiators and the management level read the manual so that it could be discussed in group meetings.

The semi structured group discussions were organized during the finishing process of the sales process manual. The manual was carefully studied and discussed. Based on the comments and discussions by the sales negotiators and the management level of the company, the manual was improved to respond the needs of both the sales negotiators and the management personnel. The challenges mentioned in chapter 2.2.3 were reduced by stressing the open discussion of the topic and the goal of the process manual, which was to guide and facilitate the work of the sales negotiators. In addition, some of the discussions were conducted without the management level of the company to ensure an open atmosphere among the sales negotiators.

The group discussions and interviews lead to only small changes in the manual. The main session to finish the manual was thus done with the CEO in a whole day meeting, where the over hundred pages long process manual was scrutinizes word by word. By this the quality of the manual was carefully studied to find out whether the usage of the right terms, the structure and the proceeding of the processes and the factual content of the manual reached the desired level.

The sales process manual will become useless, if it is not used and if needed, updated properly. Therefore the sales negotiators were encouraged to use the manual actively in their work and to inform the management level about the possible improvements to it. Since the writer of the manual is not working in the company anymore, the manual includes practical information to help the new person in charge to update it. The further changes and improvements to the guidebook will be decided by the management level of the company.

What could help to maintain the updating process of the manual is a formal procedure for improvement and update suggestions. Since the company is small an has a low hierarchy, the regular meetings, were the processes of the company are discussed, may be at the moment adequate enough for the updating of the guidebook.

8 CONCLUSIONS

The main goal of this thesis was to create a sales process manual for the sales negotiators in the case company, MML-Group. This goal was achieved by answering the research questions stated in the introduction chapter.

The operations and processes inside an organization were studied in chapter 3. The knowledge gained through studying these themes was applied in forming and dividing the processes of the sales process manual, from sales processes to reporting processes.

The features of the sales work and its processes were the topics of the second research question. In chapter 4 the circle of sales was presented as well as some features of the BtoB sales. Since the sales process manual did not concentrate on advising how to sell but rather which processes and steps of processes the seller would go through, further research on sales work was not necessary for the purpose of the thesis.

Chapter 5 discussed an organizational manual in general. The topic was further studied in chapter 7.3 and its sub chapters, where the writing process of the sales process manual in the case company was described. The documentation phase of the writing process was presented in chapter 6.

The literature base behind the writing process of the manual enabled the manual to follow generally accepted guidelines, thus becoming a good quality manual for the sales negotiators.

The sales process manual created for the MML-Group was created for a need. This need of a guidebook for sales negotiators was fulfilled with the manual, which is now used by the sales negotiators as well as the management level of the MML-Group. It is also updated in order to keep it beneficial for the company. I believe that I have reached the goals of this thesis and offered to the commissioner of the thesis a satisfying output.

During the writing of the thesis as well as the sales process manual I have learned to cover wider and more multilevel ensembles. Considering the future working life, it has been a good lesson to learn to apply the knowledge gained from both literature and research in order to create new entities.

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