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Developing a Toolkit for Supporting the Sales Process in an IT Company

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This thesis aims to examine the case company sales process and identify what kind of tools are missing from the current sales process. The outcome of the thesis is a proposal for a new toolkit which would support the current sales process to reach higher sales results.

To achieve this purpose, the Thesis utilizes action research (AR) as its research approach. In this approach, one of the key points is the customer and the case company involvement with the aim to improve the current way of selling. This study draws from three main data sources which are internal interviews and documentations, and customer interviews, utilized in the current state analysis and building the first version. External interviews which are as well utilized in the current state analysis and building the initial version. Company internal material is used for the current state analysis and finally the steering group meeting data is utilized when building the final proposal. Research design includes data collection, best practice collection, executing the current state analysis and based on the identified needs, and proposes a solution to fill the gaps in the current sales performance.

The outcome of the thesis is the proposal of a new toolkit to support the current sales process and help the sales team to perform at a higher level in the future. The toolkit contains a set of focused practical business-to-business sales tools and proper explanation how to utilize them in the future. To enable the new toolkit, the thesis also proposes an action plan how to implement the proposal into practice. The action plan contains eight steps and practical tasks for the case company to ease the implementation process.

Keywords	Sales Process, Sales Tools, Sales Toolkit, IT company

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ACRONYMS

BID	Special pricing for certain product given by the wholesale
BUNDLE	Combining several products into one package
CRM	Customer Relations Management (Software)
IT	Information Technology
SLA	Service Level Agreement
B2B	Business-to-Business
ITIL	Information Technology Infrastructure Library

1 Introduction

This Thesis explores the current sales process of the case company and analyses the tools currently used in each phase of the sales process. As its outcome, the Thesis seeks to find tools that could be used in the sales process and propose a new toolkit in order to improve the current sales process.

1.1 Case Company Background

The case company of this study is a Finnish information technology (IT) company specialized in technical and system support. The company also runs and participates in IT projects and acquisitions. Company offerings include customized software products to cover special industry needs such as logistics and warehousing. In addition, the company operates as a software vendor in business-to-business. The company is privately owned and have been in business since 1994. The company's turnover in 2013 was approximately 2, 5 M€.

The case company focuses on service business in the IT sector. Over the time of its existence, the company has slowly changed its approach from a software vendor to a more service-centred company. Changing the focus has taken many years and, as a result, some parts are still requiring more focus, especially the sales process. Changing the focus and being forced to hire more sales people led to some diversity in the sales process. Consequently, even though the sales process is applied by the sales team, the supporting sales tools are not used in the most efficient way, thus causing deviations in the sales results.

The case company has been growing steadily in the recent years, mainly by expanding its network through acquiring new customers. Presently, the sales team consists of a group of five people with complementary backgrounds and expertise.

To achieve positive results in sales, the case company has developed a tailored sales action plan including different specific actions in a timeframe presenting the progress of the sales process. Main attention is presently given to how the sales person ought to conduct the process, much less focus is presently given to actual sales tools supporting the sales performance inside the sales process.

In order to improve the current sales process and get more customers, the sales functions need to be further crystalized and the actual sales tools developed to a good shape. This includes examination and re-evaluation of the process, as well as the development of new practical sales tools, will help in streamlining the process and forming the guidelines how the sales process ought to be conducted.

1.2 Business Problem, Objective and Outcome

The business problem of this study is the lack of effective practical sales tools to support the current sales process. As the case company has been growing in the recent years, the sales functions have not been able to keep up its development at the same pace. Even though the sales process is followed by the sales team, the tools in the process are not supporting the process well enough in order to achieve the targeted sales performance.

Presently, the lack of unified sales toolkit leads to too many variations in utilizing the existing tools. Therefore, a well-organized and solid performance through using the unified effective sales tools is missing in the sales team. As a result, sales person may not be able to close a deal or suggest a wrong kind of offer to the prospect client which can cause losing the case.

The objective of this study is, thus, to improve the sales process of the case company. In order to achieve this objective, the study explores and analyses the current sales tools utilized in the case company, maps the current sales process and identifies the current process gaps. Based on that, the study, suggests a new toolkit that would fill the gaps in the current sales process.

The outcome of the thesis is a new toolkit for helping the sales team to perform at a higher level in the future. These tools are proposed to management of the company in order to support the sales process. To enable this proposal, the study also suggests an action plan containing the steps for putting the new toolkit into action.

1.3 Scope and Structure of the Study

The sales process in this study starts with the first meeting and its preparation and ends at the phase where the service reaches the point of stability. In other words, the sales process ends at the point when the first common project or a service is launched with the customer. The same approach is used to scope the current study. It means that functions of marketing and finding the new prospects are scoped out of this study.

The thesis report is written in eight sections. Section 1 describes the research problem, objective and outcome, also presenting the introduction to the matter and the case company background. Section 2 discusses the research design and data collection. Section 3 outlines the practice in sales process. Section 4 presents the current state analysis. Section 5 reports on best practice in business-to-business sales tools also presenting the conceptual framework. Section 6 contains the initial proposal. Section 7 presents the final proposal including ideas given by the case company after initial proposal. Section 8 summarises the thesis and evaluates the results.

2 Research Approach

This section describes the research methodology utilized in this thesis. It also contains the research design and research process, and answers the question how and from where the relevant data is collected and how it is analysed to make the results valid and reliable.

2.1 Research Design

The research approach utilized in this thesis is Action Research (AR). Action research is selected because it is considered as an approach for solving practical issues by utilizing collaboration between the company and the researcher (Coughlan et al. 2002). Key features of action research are collecting relevant data from the studied sources and putting it back into the process through collaborating with the team involved in developing the process. Therefore the outcome of action research also includes the learning process which helps the company later on. At its best, action research forces participants to critically overview and change the process they are working with (French 2009), thus bringing positive change to the organization.

This action research focuses on specific issue which appears in the case company's business performance. The nature of this research does not include creating general knowledge or theory building which could be utilized widely (Coughlan et al. 2002). The aim is rather focused on proposing a specific tool and plan for implementation to benefit the case company.

The design of this research is built in the way that the outcome will match the objective defined at the beginning. A critical step in action research approach is the data collection phase and the interaction between the best practise gathered from the relevant literature and the data collected from the process. In the research design in this study, filling in the gaps in the current process with the relevant knowledge is followed by reflecting on the results, with special consideration of the validity and reliability of results in this study. The research design of the thesis is presented in Figure 1 below.

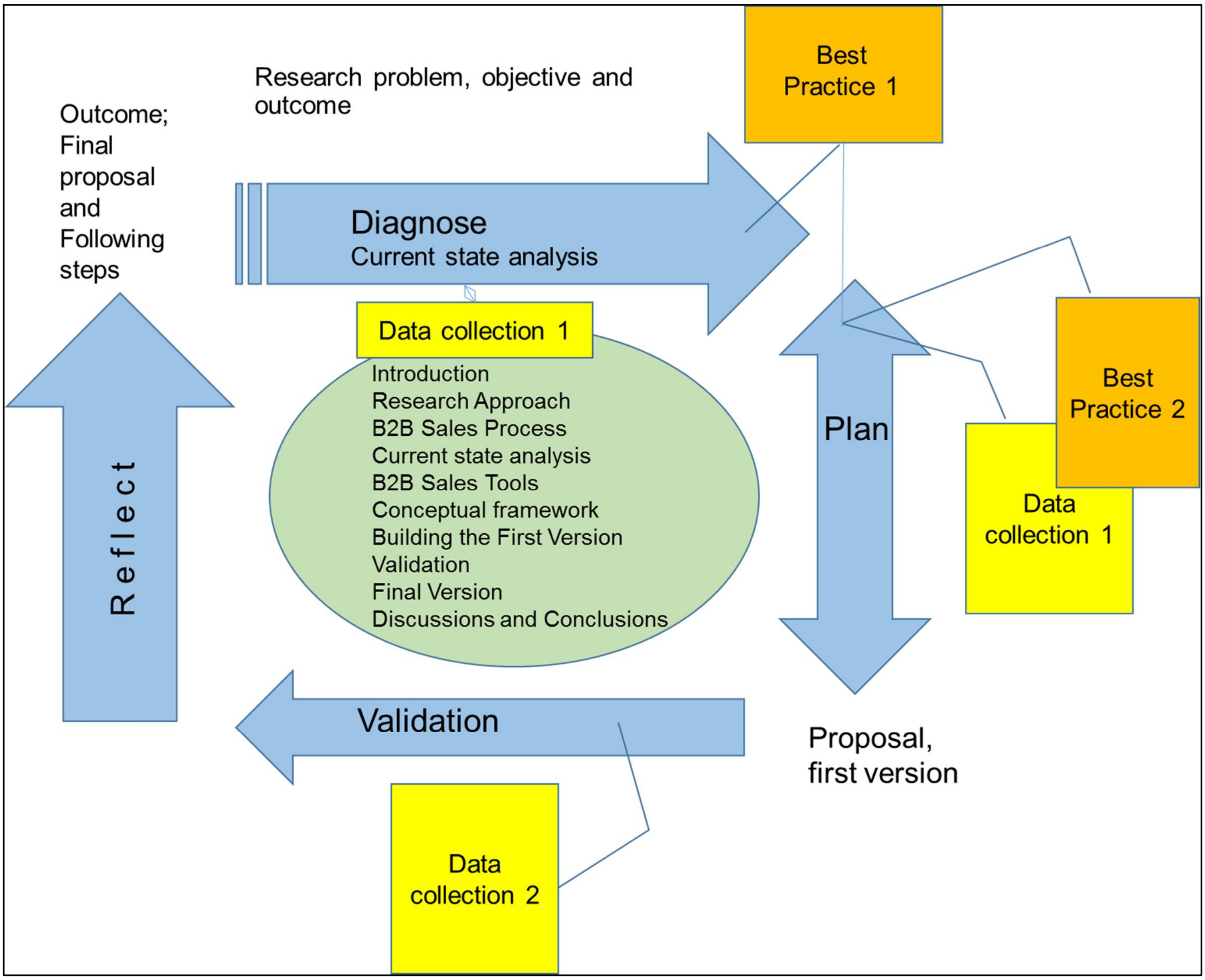

Figure 1. Research design.

As seen from Figure 1, the first phase of the study identifies the research problem, sets the objective for the study, and identifies its outcome. The second phase executes the current state analysis in order to diagnose the business environment related to the problem. The current state analysis utilizes best practice for the sales process identified from relevant literature. Also data collection is executed by gathering data for the current state analysis. The current state analysis is followed by the planning phase including studying the best practice concerning business-to-business sales tools and parallel building the initial proposal. Outcome of the planning phase is the first version of the proposal. The planning phase is followed by validation of the initial proposal. The case company participates at this stage by evaluating the initial proposal and presenting the points to develop further. Based on the comments suggested in the validation phase, the final proposal is built in the reflecting phase. In addition, the outcome contains the action plan for implementing the proposal.

The research process in Figure 2 below shows the actual steps for achieving the research objective.

STEP 1	Identifying the Business Problem, Objective and Outcome	
STEP 2	Sales Process (Section 3) Literature: Kaplan and Armstrong (2008), Jobber and Lancaster (2009), Anderson et al. (2009) and Burlton (2001)	BEST PRACTICE 1
STEP 3	Business-to-Business Sales Tools (Section 5) Literature: Moncrief and Marshall (2005), Marshall, G., Moncrief and Lassk (1999), Moncrief (1986), Yu-Lee and Haun (2006)	BEST PRACTICE 2
STEP 4	Current State Analysis (Section 4) Company Documents, Internal Interviews, Customer Interviews, Sales Expert Interview	DATA COLLECTION 1
STEP 5	Building a Proposal for a Toolkit (Section 6) Analyzing and Combining Best Practice and Data Collection. Proposing the First Version	DATA COLLECTION 1
STEP 6	Validation of the Proposal (Section 7) Steering group meeting inside the Company	DATA COLLECTION 2
STEP 7	Discussion and Conclusion and the Action Plan for Implementation	OUTCOME

Figure 2. Research process.

As seen from Figure 2, the research process starts from Step 1 which is identifying the business problem, setting the objective and planning the outcome for the thesis. These points relate to Sections 1.2 and 1.3 in the Thesis. Steps 2 and 3 include best practise search from the relevant literature. The key topics for this search are business-to-business sales process and business-to-business sales tools. Findings from the relevant literature offer a holistic view of the sales processes and the sales tools gathered from different business fields. They also identify the key tools to proceed to the next steps. Steps 2 and 3 are implemented in Sections 3 and 5. The outcome of the literature search is adjusted to the needs of the company identified in the current sales process analysis, and merged into the conceptual framework for the thesis in Section 5.4.

Step 4 focuses on studying the current state of the case company sales process. The current state analysis is executed with the help of interviews and evaluation of the existing material from the company database. Step 4 creates a vision of the tools missing in the current process, as compared to the best practice identified in Steps 2 and 3. Description of the current state analysis is presented in Section 4.1.

Steps 5 and 6 concentrate on building a proposal, based on the results of the current state analysis and findings from the best practice search. Since none of the best practice can be implemented in the process as such, Steps 5 and 6 require fine-tuning in the sales tools and sales process models done through the interaction with the company and collaboration with the key personnel. Steps 5 and 6 relate to Sections 6 and 7. The final Step 7 presents the outcome including the proposal, action plan and checking the validity and reliability of the study.

2.2 Data Collection and Data Analysis Methods

This study draws from three main data sources which are internal and external interviews, and internal company documentation. The internal interviews are utilized in the current state analysis and building the first version. External interviews are also utilized in current state analysis and building the initial version. The company internal material is used for the current state analysis and finally the steering group meeting data is utilized when building the final proposal based on the validation session.

The existing data about the current sales process (Data 1 in research design) functions as starting point for this thesis. The existing data is based on the company's internal material and sales team interviews. The data from the previous interviews is also utilized when aiming to obtain knowledge on how to improve the current sales performance. Finally, the steering group meeting is executed (Data 2 in research design) to get knowledge on how to improve the initial proposal. The data were collected from the sales team and external expert interviews between January and February 2014, and the existing material was accessed from the case company's database. Table 1 below presents the steps for gathering the data and the methods of documenting it.

Data from	Participants	Topics	Date	Length	Documents
Existing company data		Current sales process and tools given by the company	January 2014	3,0 hours	Introduction material for the new entrants in the sales team
Interview 1	Case company sales team (4 interviews)	Current sales process, current sales tools and best practice in use. Free comments	January 2014	2,0 hours per interview	Field notes
Interview 2	Outside sales consultant	Sales process and tools in theory, best practice from relevant companies	February 2014	1,5 hour	Field notes
Interview 3	Customer interview (2 key customers)	Own sales process and buying process, key elements for successful selling, arguments for choosing the seller and case company's sales overviewed from outside the company	February 2014	1,5 hour per interview	Field notes
Steering group meeting	Company sales team and managers	First proposal review and validation	April 2014	2 hour meeting	Field notes

Table 1. Data collection steps.

As seen from Table 1 above, each phase of data collection produces different types of data to achieve a broad overview of the current situation and collect ideas on the issues discussed.

The existing company data offers the starting point for current state analysis. It comprises the material presented for the newcomers when joining the case company's sales team. The target of the first step is to get the idea how is the sales team taught to operate inside the current sales process at the moment and what are the sales tools currently provided by the company.

Interview 1 included four separate interviews with each sales team member and were conducted with the current sales team of the case company about them following the current sales process and using the existing tools. It increased the knowledge about the sales people's functions and operations in different phases of the sales process. Another goal was to involve the relevant people to this study and activate them to critically think about how they work at the moment.

Interview 2 was conducted with a sales consultant from outside the company. This person has been working with the company for some years being responsible for training of the sales team members. The person also worked with other companies in different business areas bringing a broad view about the sales in general. The topics included practical sales tools and process, and analytical overview about the current sales process of the case company.

Interview 3 was conducted with two key customers who represent a typical customer of the case company. These key customers maintain a close contact with the case company's sales team and have a vision of how the sales process is seen from outside the company.

Finally, the *steering group meeting* was conducted with the company sales team and managers. The goal was to present the first version of the toolkit and obtain feedback on the toolkit and the results achieved so far. Based on these comments the necessary changes were made before proposing the final version to the case company.

Internal data

The documents used from the company were mostly presentations for the new sales team members joining the company's sales team. These presentations included the process description of the current sales process and also contained some instructions, of how to perform in the process and what sales tools to utilize in each phase. The presentations offered more guidelines for the sales force rather than detailed descriptions.

Interviews

The internal Interviews were conducted at the beginning of the study between January and February 2014. The sales team was interviewed and also discussions were held about the current sales process and tools. The sales team members (4 separate interviews) pinpointed the strengths and weaknesses and shared their thoughts about the process development in the future.

The external interviews were conducted so that the key customers were identified among the company customer database. The reason for selecting them was the nature of the customer relationship between them and the company. Meetings were held face-to-face between the customer representative and the researcher, and they were held in the open-end interview format. These customer representatives were also invited to participate the discussion, the list of questions were not provided in advance. After the discussion the field notes were reviewed with the customer representative to ensure the accuracy of the field notes. Field notes mostly followed the same logic as in sales team interviews.

Second part of *the external interviews* was the sales expert interview which was conducted with the consultant outside the case company. This person has been working with the company for a few years being responsible for training the sales team members. The person also works with other companies mainly in business-to-business field. He offered an overview of sales processes in general highlighting the most significant factors no matter what the product or service involved. In addition he shared ideas about the buying process of the customers, since this particular perspective was especially valuable for the researcher.

The interview questions are presented in Appendix 1.

2.3 Reliability and Validity Plan

This study has a reliability and validity plan executed in order to ensure the quality of the research. It aims at ensuring that the reader could rely on the information provided in the research report as trustworthy. It includes;

Validity

The fundamental scrutiny of validity is comparing the findings to original research question Quinton and Smallbone (2006). Validity also ensures that research instruments such as internal company data, interviews and data collection aimed at solving the research problem.

In this study, validity is planned to be ensured by utilizing data which is directly attached to the research problem and can be used for solving the actual problem. Another critical point is to execute enough interviews to collect the data and also making sure that the interviews are properly conducted, questions are relevant and field notes are documented.

Reliability

The fundamental scrutiny of reliability is evaluating whether the results would be same if the research was repeated in a different environment, by a different research team, or at a different point of time (Quinton and Smallbone 2006). In qualitative research, when people are involved, the tools for evaluating the reliability are mostly evaluating whether the findings are based on relevant evidence, as well as critically recognizing self-input in relation to the outcome (Quinton and Smallbone 2006).

In this study, reliability is planned to be ensured by utilizing various relevant data sources, collecting the information which is up-to-date and analysed by scrupulous researchers, and by applying established theories which are proven to be functional. It is also increased by interviewing people who are constantly working in the problem area and have substantial experience related to the research problem.

3 Business-to-Business Sales Process

This section examines the fundamentals of the sales process based on the existing literature. In order to achieve a holistic view, different variables are studied and their key elements are compared. At the end, the section presents a more general approach to the sales process to answer questions such as what is a sales process and what are the key elements of it. The section also discusses the question of what is the sales process supposed to achieve.

3.1 Describing a Sales Process

Sales process can be considered as a set of activities for grouping and managing the sales unit in a systematic way (Kotler and Armstrong 2008: 466). If viewed from the operations point of view, sales process is the chain of actions or a funnel which leads prospective customers (prospects) to become actual customers. The common goal for the sales process is, first of all, finding and achieving new customers, then, maintaining the existing relationships, and eventually, making new sales (Kotler and Armstrong 2009: 466). In other words, the target of the sales process is creating value for both parties and making the business more successful through collaboration (Jobber and Lancaster 2009: 248).

Sales process like any other business process generally includes different actions which usually are initiated by a certain type of event (Burlton 2001). These actions can vary and can be tied to a single person, team or even pertain to the whole company. The sales process is planned in the way that the outcome satisfies the stakeholders who participate in the process. Therefore the process ends when the final outcome has met the set targets (Burlton 2001).

Since the sales process is dependent on the stakeholders, it looks different in different companies. Its target can be more or less the same every time, to turn the possible future customer, or prospect, into a profitable customer through mutual collaboration. The offerings may differ for the goods and service based companies. In the goods-oriented companies, the offering is something tangible, while the offering based on services includes more interaction and co-creation with the end-customer. This difference can be explained by the fact that the value creation logic is unique in every case (Lovelock and Gummesson 2004). A product based offering serves a different value creating logic for the end-customer. For example, it may offer to replace part A with part B which can lead to cost savings; or in the purchase of a certain type of tool, it can open new business opportunities for the end-customer. In addition to business processes following different business logic, they are often restricted from other points of view. There are often limitations for the process itself, for example, laws, policies, standards, regulations, ethics, resources and so on; borders for acting can also be set by the company itself or the business environment outside (Burlton 2001). These limitations set guidelines for acting and guidelines for managing different types of offerings. This needs to be taken into consideration when developing the sales processes.

Like any other business process, the sales process requires measuring it in order for the stakeholder to know is the process working as it should be. Measuring the results with tangible variables such as money or intangible methods such as interviewing participants or using surveys and questionnaires, should also lead to the process improvement (Burlton 2001). When it comes to the sales process, the results can also be used for the sales force rewarding.

3.1.1 Overview of the Sales Process Phases

Sales process targets for partnership with new customers. Therefore sales process usually starts with finding the suitable future customers (Kotler and Armstrong 2008; Jobber and Lancaster 2009; and Anderson et al. 2009). These suitable prospects should meet the company’s standards, for example when it comes to company size, resources required or service suitability for the end-customer.

Before contacting the prospect, some homework or preliminary actions are recommended, for example studying the prospects history, presence and future objectives in order to finding common targets or points of collaboration which could benefit both parties (Kotler and Armstrong 2008; Jobber and Lancaster 2009; Anderson et al. 2009). The value creation with the prospect should start from the very beginning. Already in the first meeting the sales actions should meet the prospects requirements (Kotler and Armstrong 2008; Jobber and Lancaster 2009; Anderson et al. 2009), and not sales person objectives.

After presenting the offering and showing the benefits the sales person is most likely going to meet some objections and counter questions from the prospect, once again several approaches can be utilized when handling objections (Kotler and Armstrong 2008; Jobber and Lancaster 2009; Anderson et al. 2009), those are more or less case sensitive but some guidelines can be followed. These are studied more carefully in the following sections.

If objections can be handled successfully the following step is to get the order or get the signature for the agreement (Kotler and Armstrong 2008; Jobber and Lancaster 2009; Anderson et al. 2009). Closing the deal requires efforts from both parties and it the sales person’s responsibility to create an atmosphere where the closing is made as easy as possible.

After closing the deal comes the aftersales or follow-up (Kotler and Armstrong 2008; Jobber and Lancaster 2009; Anderson et al. 2009). This part is making sure that offering met the set target and making sure that the customer was satisfied with the results, in addition these actions should lead to new business in the future.

Summing up, the sales process structure in general and from, certain principles was identified when it comes to actions inside the process. Also the target and target setting was recognized to be the basis of the process. Best practice discussed that sales process ought to be well-structured and the sales tools integrated so that those support the sales process. This ought to be utilized in the study when proposing improvements to the current sales process.

3.1.2 Kotler and Armstrong's Approach for Sales Process

In this section the model by Kotler and Armstrong (Kotler and Armstrong 2008) is studied more carefully because they offer a comprehensive general overview about the sales process giving actions as guidelines, and their approach to the sales process presents the seller's point of view of the sales process. The sales process model by Kotler and Armstrong includes 7 steps prospecting and qualifying, pre-approach, approach, presentation and demonstration, handling objections, closing and follow-up presented in Figure 3 below.

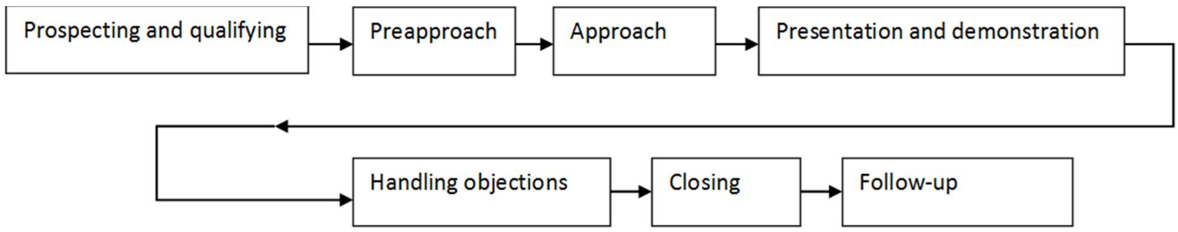

Figure 3. Major steps in effective selling by Kotler and Armstrong (2008: 466).

The model includes 7 steps which are introduced in detailed step by step below. *The first step* is prospecting and qualifying. The target of this action is to identify the prospects who meet your standards as a customer. It is important to set the right standards for suitable customers because sometimes serving a customer can cause too much expenses or overload the company's resources, also terminating where and how to find these from the mass. Actions for finding the suitable prospects also tie the company resources when requiring many phone calls, e-mails and other ways of time consuming communication. Sales resources are oftentimes limited so the efforts should be well targeted in order to achieve a successful hit rate. In addition critical screening is required from the sales force to be able to separate good prospects from the bad ones.

The second step suggested is a pre-approach. The goal for the pre-approach is learning about the prospect, people, and the organization as much as possible before making the first move. The objective is to find the common points of interest, in other words, the functions which would benefit both parties. Quite often this requires understanding the prospects business field and challenges inside it in order to able to find the spot where value could be created to both parties. The sales strategy for the prospect should be built on these key points, and later on the offering should follow the same logic.

The third step presented in the model is the approach. The approach is the actual first meeting with the prospect. The meeting should be conducted in the way that positive atmosphere for buying is created for the prospect. This often requires a skilled person with good social skills and ability to start the discussion from the right track. All the attention should be on the prospect and the discussion should lead to the prospect's issues. Asking the right questions and letting the prospect speak are the key functions here. The same sales strategy should work as a guideline in the first meeting.

The fourth step is the presentation and demonstration. This represents perhaps the most crucial phase in the sales process. Here the target is to match the prospect's needs to the company's offering. It includes demonstrating how the solution offered would resolve the prospect's issues and presenting how the prospect would be able to utilize the company's services in the future. In other words, this stage involves presenting how the prospect would be able to create value to its business by collaborating with the case company. In order to achieve this level in the discussion, the previous phases must be conducted efficiently and the same logic should penetrate through the whole process. Step 4 demands discussions with the prospect as well as other interactions in order to clarify the goal for both parties.

The fifth step includes handling objections. This is the situation where difficult decisions awake objections, oftentimes rather imaginary than real, but in any case requiring some extra reassurance from the sales person. No matter what the case is, it is up to the sales force to overcome objections by convincing the prospect demonstrating the actual benefits or creating a secure atmosphere where the decision making is easier. Once again social skills and interaction with the prospect plays the key role.

The sixth step is closing. As well as in step 5, closing the deal or "getting the signature" demands considerable social skills. Decision makers have various limitations when making decisions, for example, resources such as money or restrictions such as the company budget. In addition there is the decision maker's own reputation at stake. Nevertheless business decisions are made by human beings so the reason for signing or not to signing the contract may also be more human. The sales person should sense these signals and make it easier for the decision maker to close the deal. Oftentimes there is a momentum for this which should be noticed. The target for this step is to close the deal.

The seventh step is the follow-up. Taking into account how much effort has been put into previous steps the follow-up is the necessary logical end to the sales process. The key element is to make sure that the offering has been delivered in the way that it was promised and to make sure that the customer is satisfied. Once again interaction with the customer is required in order to get the valid information and feedback. In the end, the follow-up also targets repeating the business again if desired. Active forms of contacts such as visits and phone calls are recommended in order to awake proactive discussions (Kotler and Armstrong 2008).

Summing up the 7 steps presented above, it can be said that the sales process should start from finding the qualified prospects, include pedantic preliminary information search, convincing the customer with presenting the actual benefits which arouse from problem solving, handling the objections, and closing the deal when the time is right. In addition, the follow-up phase should aim at repeating the business. The sales process presented above requires a lot of personal selling skills in addition to the considerable "people" skills. In the end, selling and buying revolves around making decisions and decisions are made by human beings. Importantly, the focus of the sales process is the prospect and prospect's needs, not the company's offering. In order to execute a successful sales process, each phase should be conducted in a systematic way, following the same logic and the sales strategy created in the beginning, when starting the discussions with the prospect. Finally, it is also important to keep in mind the proactive interaction with the prospect using active forms of communication.

3.1.3 Jobber and Lancaster's Approach to Sales Process

The second model of the sales process by Jobber and Lancaster (2009) offers the perspective from the sales person's point of view, providing a more personal overview of the sales process. In general, the approach has similarities with the previous model but as the approach is slightly different it offers different kind of value for the research. This model is presented in Figure 4 below.

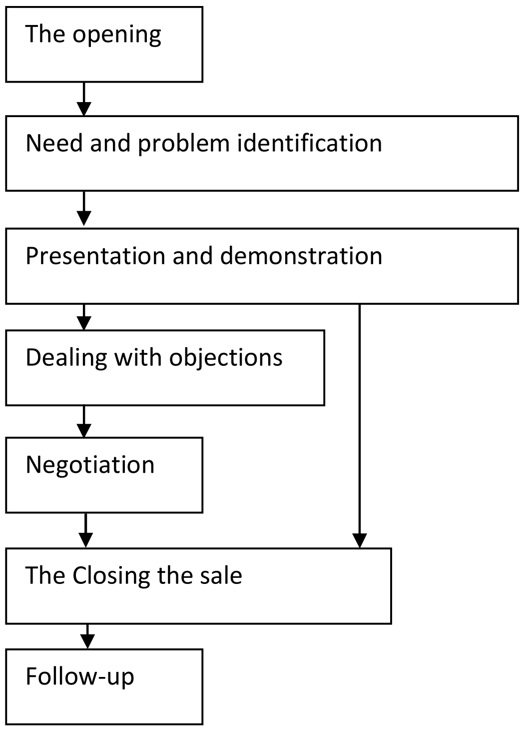

Figure 4. The personal selling process by Jobber and Lancaster (2009: 248).

As seen in Figure 4, the model includes 7 steps which are introduced in detailed, nevertheless some of the exactly same features presented in the previous model are excluded.

Phase 1 represents the opening. In the opening phase the sales person presents oneself to the buyer, making the first impression and giving the face for the whole company. Business-like behaviour and good manners should be delivered in order to creating the right atmosphere and positive start for the discussion. The purpose for the visit should be clearly presented at the very beginning so that the target is clear for the buyer. Oftentimes the time is limited and the discussion can easily go of the track. The target for sales person is to make a good first impression, setting a common goal and start the discussion and interactions. Proper behaviour, good manners, business-like appearance and asking questions are the key elements.

Phase 2 represents the need and problem identification. The starting point is the understanding of the prospect's business environment and business conditions. Only after this the problem identification is possible to make accurately enough. Oftentimes the sales person has a wide portfolio of solutions, therefore the scoping is important. In addition the problem identification might be challenging because the buyer does not necessarily known the actual root cause or is not willing to reveal the company weaknesses right away, therefore the discussion and open-ended questions ought to be used. In addition the sales person needs the know-how of understanding messages between the lines also experts can be utilized to show the customer that the company is willing put effort in order to get the deal. A general company presentation or list of offerings could have a negative effect revealing that the sales person is not aware what the actual need is. The target for phase 2 is to identify the problem and the need tools offered are asking the right questions and listening to the buyer. In the end the sales person should once again check and make sure that he or she understood key points correctly.

Phase 3 includes the presentation and demonstration. The presentation should be based on the problems and needs identified in the previous phase. Already at the beginning the offering should match target, various solutions could misguide the prospect and complicate the decision making process. When the offering is clear, the focus should be on demonstrating the actual benefits and the value the offering provided to prospect after implementation. Even though the solutions offered might contain various features, the highlight should be placed on the ones that meet the customer needs and would provide benefits. Sometimes comparison to other hypothetical situation could make the benefits more clear. Even though the benefits would be well-presented, the acquisition is always a risk for the buyer, therefore the sales person should be able to convince the prospect. It can include presenting references or previous success stories, demonstrating the solutions or giving the prospect a period of time when he or she can test the offering beforehand. In addition, guarantees can be offered in order to convince the buyer (Jobber and Lancaster 2009). The target for phase 3 is to present the customized solution for the prospect and highlight the benefits, and convince the prospect.

Phase 4 includes dealing with the objections. Oftentimes the prospect has doubts and desire for further knowledge. Even though those can be identified as objections those should not be recognized as negative signs. It is normal that prospect seeks backup for making the final decisions, which can be manifested as questions, comments, signs of worrying or expressions of interest of the solutions. The reaction from the sales person should be positive and interactive rather than dismissive. Opening the discussion again and letting the prospect speak about the objections can lead to the key points which require more convincing efforts from the sales person. The target for phase 4 is to find the actual reasons for objections and tackle them. Here it is necessary to let the prospect discuss about the issues he or she feels unsecure; on the other hand, the sales person needs to have the proper strategy for possible objections holding the same logic till the end.

Phase 5 represents the negotiation. In some point of the selling process, a negotiation is recommended in order to go through terms of the sale. The target is to clarify the details of the sales for example the price, delivery time, payment terms and other details. Oftentimes it is necessary for the sake of clearing the terms for both sides. On the other hand, the buyer might call for discount or changes for service level agreements or other details involved. Once again it is vital to listen to the customer but also prepare for negotiating about the changes. If tuning the service level the price might go higher or vice versa. Negotiations requires skills from the sales person in order to see the bigger picture and how things are dependent on each other. In the end the result ought to be something that both sides can agree.

Phase 6 includes closing the sale. Even though previous phases have been successfully conducted, first impression was positive and behaviour appropriate, prospect's problem was identified and proper solution presented as well as benefits demonstrated, objections handled successfully and extra negotiations went through the final decision still will not come automatically. There still might be issues and doubts on the buyers mind. At this point it is up to sales person to get the final answer from the buyer even though the answer might be no it's sales person's responsibility to get it out. The longer it takes the less likely the answer is positive therefore the sales person needs to sense the right moment or the buying signals for closing the deal. Sometimes the solution offered is not bought at once in these cases the sales person should offer steps for achieving the final target, the collaboration could start from smaller detail and mature later on to the actual solution offered at the beginning. Sales person can utilize various techniques when trying to close the deal therefore there should be a strategy also for alternative result. Nevertheless closing the demands persistent and systematic efforts in order to achieving the positive results.

Phase 7 represents the final step, the follow-up. From the sales person's point of view, this means ensuring that the customer is satisfied with the results after sales and also making sure that delivery and implementation was conducted as planned. These efforts also target for repeating the sales and starting partnership with the new customer. Tools for checking are visiting the customer, phone calls or e-mails. Interactions after the sales are important because the customer may be insecure whether the purchase was right or not. Therefore offering a channel for further discussions and also assistance for making the next deal is crucial for both sides. For the customer it is signal that the sales person cares about the deal so much that he or she wants to make sure that the original needs were met in the correct way. The goal for the follow-up is to make sure that that the offer was delivered and the implementation was conducted in a proper way, the customer was satisfied and prepare for repeating the sales in the future (Jobber and Lancaster 2009).

As a conclusion, the sales process, from sales person’s point of view includes various phases requiring various individual skills which should be utilized at an appropriate time and in a suitable situation. The process starts from the opening where the first impression is made and the company is introduced to the customer; and it proceeds to the need and problem identification part where the problem is identified and proper solution provided. The next phase is demonstrating the actual benefits and after that dealing the objections that might occur. The necessary negotiations phase were followed by closing the deal with the prospect. Final phase included follow-up actions such as making sure the customer satisfaction.

The personal sales process model by Jobber and Lancaster (2009) offers one route for executing a successful sales. The process itself cannot be duplicated as such but on the other hand it serves as framework for proposing a tailored sales process for the case company. There are many phases that occur in a sales process and many human factors presented should be taken into account when planning a sales process.

3.2 Summary of the Best Practice in Sales Process

Two different approaches to the sales process were discussed in this section to identify the most significant features of the sales process. The first one is the model created by Kotler and Armstrong (2008) for effective selling. The second model is suggested by Jobber and Lancaster (2009). The reason for selecting the first approach is the reputation of the authors who have been studying the sales process across a wide business area. They offer general overview about the sales process giving actions as guidelines, and their approach represents the seller’s approach to the sales process. The second model provides a more in-depths for the overview of the sales process by offering a different perspective. These two approaches generate an overview of the sales process which can be utilized to improve the case company’s process in the subsequent sections.

Both approaches analysed suggest that the sales process should have a clear structure following the phases in logical order. The objective ought to be integrated to the phases and actions inside the process in order to achieve positive results. Also the company conducting the process should follow the story and deliver the same well-thought message to the prospect in every phase in order not to confuse the buyer. In the end the sales process should have phases which are linked together and each phase should have tools to support each phase. The target should be beneficial for both sides and aim for partnership creating value for the seller and for the buyer.

Based on the approaches presented in previous sections and in order to fill the gaps in the current process in the case company, a draft model of the sales process is proposed in Figure 5 below. It presents the initial summary of the sales process based the finding from the relevant business and research literature.

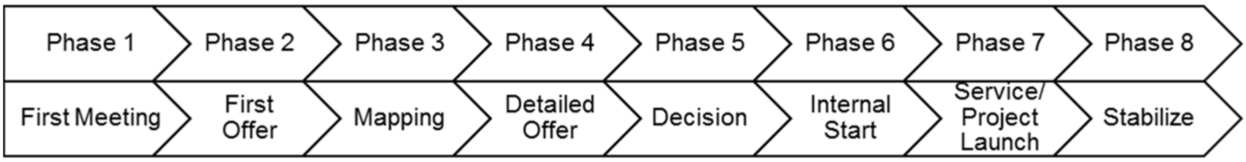

Figure 5. Sales process model.

The target for this model shown in Figure 5 is to clarify the different phases inside the process and present a coherent model proceeding from one phase to another. In addition when the sales tools are clearly specified inside each phase, they can be aligned to the target of each phase and ensuring that they are available and utilized by the sales people. This model is composed to be utilized in the current state analysis in Section 4 below. Based on the results of the current state analysis, this initial model is further elaborated into the framework for the final proposal.

4 Current State Analysis

This section describes the current state of sales process phases and supporting tools used in every phase. The data collection followed the research process and data collection steps presented in Figure 2 and Table 1 Section 2.

4.1 Describing the Current Sales Process

The current sales process was taken into use in 2012. It was originally designed by the company's executive group and also evaluated by the sales team. The implementation of the process and the supporting sales tools inside it were developed in the same year. Afterwards the process model has been taught to new members of the sales team.

Based on the sales team interviews the current process model is evaluated to be normative, including the actions to be conducted at various phases of the process. Nevertheless, as such, the current sales process was not seen as a process which could be followed systematically in every case. The tools inside the phases were also not aligned clearly to the goals in each phase. There were issues revealed in the interviews when discussing the sales process structure and supporting tools.

According to company's internal material, the current sales process is represented by a model shown in Figure 6 below.

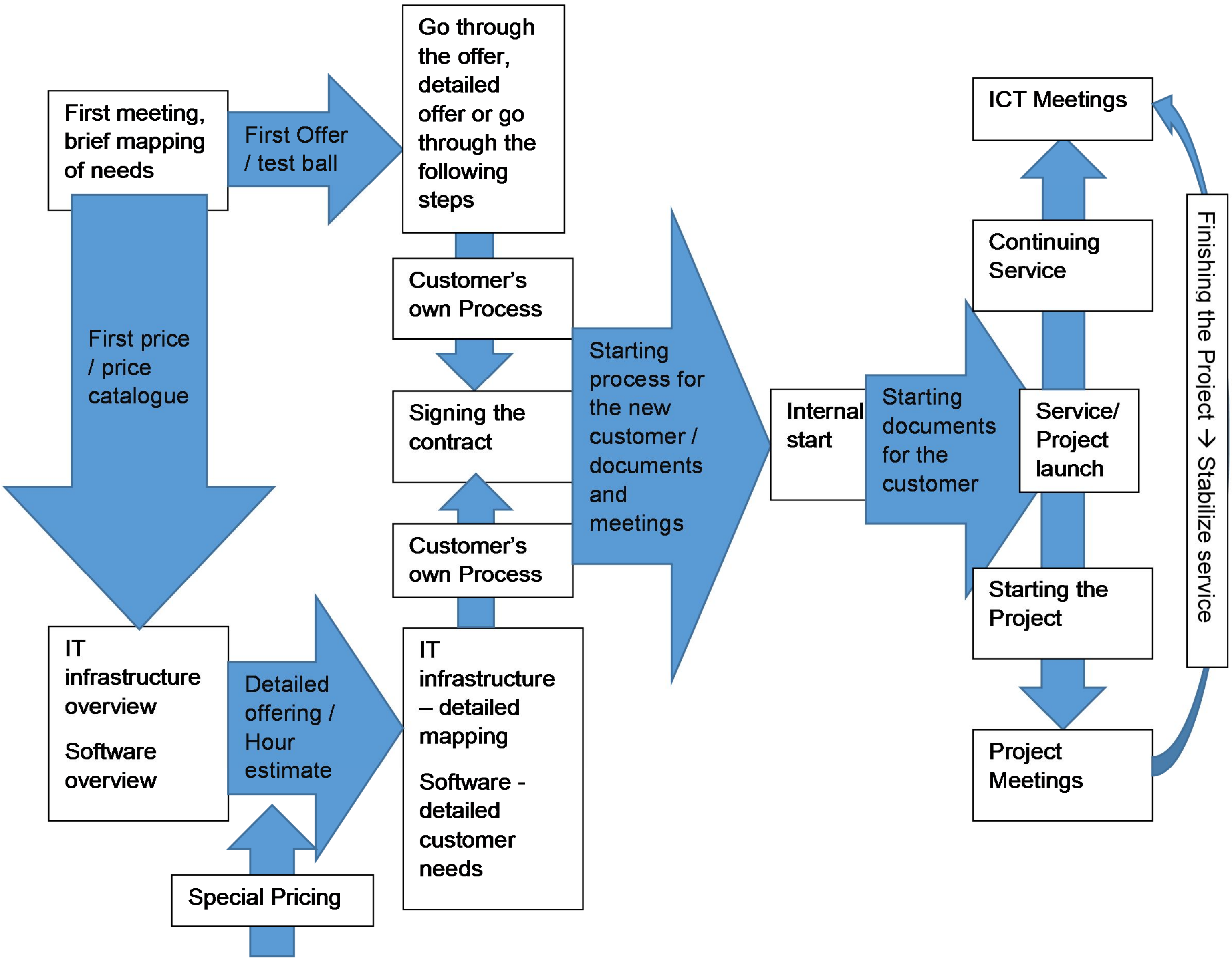

Figure 6. Current sales process Case Company (2012).

As seen from Figure 6, the current sales process progresses from the start which is *the first meeting* to the end, which ought to be the phase where the *service is stabilized* with the customer in to a normal service model. However, based on the interviews, the current process is seen more as an instruction how to guide the customer rather than systematic way of proceeding by utilizing various sales tools. The current process instructs how to lead the customer to the goal following some key actions. However, if some of the key actions fail, the process might stop because alternative tools are not available.

As seen from Figure 6, the current sales process starts from *the first meeting* with the prospect. In the meeting the target is to gather some key issues from the customer, it includes asking the prospect questions in order to clear the current state in the prospect's IT infrastructure and eventually finding some needs to be filled. The first meeting should lead to *first offer* which is usually seen as a test offer. Later on, it would hopefully lead into more *detailed offering* with the customer, and also into more detailed discussions which would clarify the situation and therefore highlighting the benefits would be easier.

The second alternative, after the first meeting, is to *offer a product or a software or a service obeying the company price list*. In other words, the second step is giving the prospect an attractive offer which could lead into more detailed discussion. This alternative can be utilized when the issues are not clear for either sides, for example, if the prospect has a need for software without knowing the details about what it should include. Both ways should include a detailed discussion with the prospect but with the minor difference that the lower path would include more *mapping* and actively helping the prospect to find the needs through collaboration. This would include, for example, mapping the IT infrastructure or mapping the need for specific software. Usually this means documenting the business environment and utilizing the documentation as a base for *detailed offer*.

When the target is clearer the company can use *special pricing*, if the project is broader, or bundling products when the case relates more to a computer hardware. Before *signing the contract* the process mentions the prospect's own *buying process* which should be taken in to consideration as it might require some additional actions from the case company, for example, delivering some additional documents for the prospect. Depending of the case this phase can demand arguing about the benefits, dealing with the objections or discussions about the pricing. Some of the things included can be influenced by the sales person but some are part of the buyer's own process and are not visible for the company.

All the previous actions aim at eventually *signing the contract* with the prospect and starting the following actions such as *launching a project or* *launching a new service* with the new customer. This includes functions inside the company such as *transferring the collected customer data to company systems*, for example, CRM and billing software. The employees also need to be prepared for serving the new customer. After *finishing the project* or launching the service the situation should be *stabilized* so that normal routines with the customer can be conducted and new business can be offered, through regular meetings with the customer in order to ensure customer satisfaction.

In order to make the current process model more visual and structure clearer, the construct identified in the Section 3 was utilized for the current state analysis. The new model is presented in Table 2 below and each phase is analysed in more detailed in subsections below.

Phase 1	Phase 2	Phase 3	Phase 4	Phase 5	Phase 6	Phase 7	Phase 8
First Meeting	First Offer	Mapping	Detailed Offer	Decision	Internal Start	Service/ Project Launch	Stabilize
Company presentation References and followers Prospect information (internet) Prospect information (CRM, partners, old customers) Prospect information (Asiakastieto) Confluence with the prospect Questions and notes, Green Card	Partner assistance (wholesale, Microsoft etc.) Test ball offer (company price list) Offering the detailed mapping project CRM notes CRM opportunity Personal notes from the first meeting	Mapping document Mapping project onsite Mapping report Customer meeting, going through the report CRM notes	Preparing the contract with CRM Detailed arguments Detailed pricing / calculating differences Special pricing Meeting with the prospect Phone calls and emails after meeting Offer based on mapping notes	Meeting, going through the offer Arguments Tuning the contract / re-offer Signing the contract Not signing the contract CRM notes including the contract	Create customer to internal system Add company to the financial system, including pricing Inform internally (email and monthly meetings) Meeting with the service manager Open ticketing system for the customer Notes adding to company intra	Meeting with the service manager, sales and system specialist Meeting with the customer Project plan (Excel) Project meetings regularly Phone calls and emails with the customer Billing SharePoint notes	Ending the project Plan monthly or weekly onsite support visits Customer satisfaction surveys ICT-meetings Reporting

Table 2. Current sales process and the sales actions.

The target for the construct shown in Table 2 is to clarify the different phases inside the current sales process and present it as proceeding formula from one phase to another.

4.1.1 Sales Process Phase 1

Based on the analysis of the current sales process, internal documentation and interviews, the current sales process starts from Phase 1, the first meeting. As mentioned earlier this process scoping does not include marketing which has been mainly outsourced to an external partner. The first meeting is the actual face-to-face meetings with the customer usually held in customer’s office.

Before the meeting the *facts and figures of the prospect* are studied, the sales actions utilized are the internet, including the prospect’s home page and Asiakastieto database for financial information. Other source for finding preliminary information are the business partners and existing information in the company’s CRM which functions as a customer database. Main factor for collecting the preliminary information is to define if the prospect fits into the customer portfolio and find confluence point which can be utilized in the first meeting. Based on the previous sources, the *company presentation* is formed. The presentation includes the basic facts such as company history, short company story and company know-how, in addition the confluence point with the prospect. *Confluence* point could be, for example, common business partner from the business field or *relevant reference*. Relevant data from the first meeting are gathered to company’s own *Green Card* which the tool for communicating the significant information for the next phase.

4.1.2 Sales Process Phase 2

Phase 2 in the current sales process is preparing the *first offer*. Preparation oftentimes utilizes *field notes* from the first meeting. Sometimes, after the first meeting the prospect needs some kind of baseline where to start especially if there is a tender organized. On the other hand first offer can function as a verification that the selling organization has the relevant offerings. First offer is executed via Microsoft’s *Customer Relations Management software* (CRM). In certain cases, for example, when offering a product bundle a special pricing is needed from the *wholesale*. The target in Phase 2 is nevertheless to offer a mapping project which would allow the case company System Specialist to go through the customer’s IT infrastructure in order to find the actual value creation possibilities for the prospect.

4.1.3 Sales Process Phase 3

In Phase 3 the System Specialist is sent to customer's site in order to execute the *mapping project*. Which includes collecting valuable data and getting familiar of what and how the prospect operates. This is executed by asking specific questions from relevant people. Data is collected to *mapping document* and the data is *stored to CRM* system. The final *mapping report* is also shared with the customer in a *separate meeting*. The target in Phase 3 is to achieve the understanding of the prospect's company, personnel and the business they ran and in addition to produce the mapping document.

4.1.4 Sales Process Phase 4

Phase 4 in the current sales process is preparing a more detailed offer for the customer. The tool for *preparing the offer is CRM*. After mapping, the following offer ought to be more customized and easier for the customer to interpret as the benefits are based on the actual facts. Also more *detailed arguing* and *detailed pricing* can be made based on knowledge gathered in Phase 3. Phase 4 requires communicating with the prospect. Active communication methods, such as *face-to-face meetings* and *phone calls*, are favoured by the case company. The target for Phase 4 is to deliver more detailed and *customized offer* for the customer.

4.1.5 Sales Process Phase 5

Phase 5 in the current sales process includes convincing the prospect to *sign the contract*. Actions for convincing are *meetings with the prospect* and *presenting the final arguments.* Common arguments are, for example, offering a comprehensive partnership instead of focusing on the price factor or emphasizing the solution more than the actual product. Some cases require *tuning the contract* in one way or another. Importantly, the adjustments ought to be *executed through CRM* so that every change is recorded in the database and can be found later on. Phase 5 aims for prospect's signature on the contract, still sometimes *prospect retreats*, in those cases prospect is put on the lead list and returned to Phase 1.

4.1.6 Sales Process Phase 6

Phase 6 in the current sales process is the internal start inside the case company. Signing the contract oftentimes leads to a project or service with the customer. In order to achieve a good start with the customer the administrative tasks must be conducted. Including, for example, feeding the collected customer *data into different internal systems*. Customer is created, for example, to *internal ERP system* and to the *financial system* to enable billing. Service requests from the customers are made with tickets therefore *ticketing system* also requires customer data and contacts. Added to previous the information needs to be *communicated to employees* so that everyone in the company is aware about the new customer and its specific needs and demands. Especially the person responsible for service manufacturing needs to be informed properly. The target for Phase 6 is efficient communication and data transfer between personnel and IT systems.

4.1.7 Sales Process Phase 7

Phase 7 is about starting the action in the customer's site, in the current sales process Phase 7 is called service or project launch. At the very beginning company points a system specialist who will briefed carefully about the customer, this person functions as *contact person for the customer*, in addition one or two deputies gets the same briefing. This is done together by the sales person and the Service Manager. These *contact persons are introduced* to the customer's personnel in the beginning of the relationship. When it comes to project or service launch, it is advised to do at the same *meeting* that mentioned previously. Contact persons with help of sales responsible and Service Manager creates a *project plan* which is imported to *company's Sharepoint* where it's available for every employee. When project starts the sales person is released from the process and acts only as supervisor and consultant if needed. When having *project meetings* and briefings the sales person can be utilized because he or she usually has a good knowledge about the customer. Important administrative task at this point is to *get the billing started*. Even though Phase 7 requires a lot of technical issues to be organized the main point is to get the customer excited about the new partner and to be able show the level of professional to get the customer to trust the company.

4.1.8 Sales Process Phase 8

Phase 8 includes tools for stabilizing the service to normal situation. Projects started earlier with the customer are declared closed in a *meeting*. Project plan is overviewed in order to state that goals and targets match. At this point a suggestion for the future is presented to the customer so that *continuity for service* is secured, oftentimes this includes *regular visits* by System Specialist when the hardware and software maintenance is taken care of. In addition the sales responsible is advised to agree regular *service quality controls with the customer*, in which the reporting of service is executed. Some specific customer's require special SLA's and the results from that has to be *reported regularly*. To ensure the customer's contentment and to offer the customer a way to give feedback, *customer satisfaction queries* are executed regularly. Finally, Phase 8 helps the customer know the service model, offer a professional service and make sure that customer is heard and taken care of.

4.2 Recognizing Areas for Improvement in the Current Sales Process

Observations about the actions requiring improvement are based on the interviews with the sales team, key customers and expert interview. Interviews are following the systematic logic presented earlier in the Section 2. In order to get valid results and follow the Action Research principles it is reminded that information about opinions are produced in collaboration with the company and not ideas from the researcher's mind. Functions requiring improvements when asked on the relevant people are presented in Table 3 below.

Person interviewed	Functions requiring improvement and other comments
Person A **Sales team member**	- Presenting the service model - Clear arguments of selling - Improvement for selling to the bigger companies - Map of competences visible - Emphasizing the company story (history, references and success stories)
Person B **Sales team member**	- Finding relevant data before meeting the prospect - Giving precise SLA's for the prospect - Emphasize references and success stories - Clear menu (product catalogue) - Decreasing the time spent in selling process (offering a timeframes for the prospect) - Transferring the data more accurately from phase to another with one document - Arguments for purchasing – demonstrating what would change after the purchase
Person C **Sales team member**	- Transferring the data from phase to another - Finding relevant data about the prospect and discovering the common interest (value creation) - Offering something "easy to buy" in the first meeting - Understanding the steps of selling – to be able to look into future and say what would be the relevant service model for the prospect - Documenting the phases properly with one document – available for everyone - Putting more speed to the process – knowing how to use the tools. Instructing other people takes time - Different calculators for showing the prospect how to benefit from buying - Better product portfolio - Regular meetings with the sales team - Improvement for selling to the bigger companies – regular contacting
Person D **Sales team member**	- Transferring the data with one document - Usage of all tools more clearer - Product catalogue for making the purchase process easier - Meetings inside the sales team for knowledge sharing
Person E **Customer**	- Emphasize recommendations and references - Presenting and demonstrating reasonable and well-argued pricing with scalability - Service model including know-how and service around the great product - Highlight the partnership – not only software but taking care of the whole
Person F **Customer**	- Before the first contact study the basic facts about the prospect, trying to find a common language - When talking to a prospect the focus should be on customer needs, not emphasizing your own products too much - Clear statement what we want to do together and why, what are the common goals - Customize the product and services – customer seeks for partnership and trust – value creation together - Using the relevant references – showing that references support your company story - Presenting how the service model is executed - Arguments why to choose the company needs to be based on facts and true stories
Person G **Sales Expert**	- Doing the homework properly before the meeting – show that you are interested in the prospect - Try to present a common interest, service model how to get there and how value is created together - Building the trust with the prospect – showing the know-how, success stories and references from the business - Emphasize the partnership instead of focusing on prices or solutions - Invite the System Specialist to the meetings as soon as possible

Table 3. Sales functions requiring improvements according to the interviewed people.

The comments and statements presented in Table 3 above are evaluated in more detailed below.

Person A. According to the replies given in the interview, Person A was mainly concerned about lack of some specific sales tools. For example lack of visual service model was mentioned, the person thought that having a visual model would ease the selling and support the sales arguments. Rather than explaining how the service offered would benefit the customer, with the help of visual model it could be demonstrated clearly. In the interview it was also mentioned that the case company ought to have a own sales process model for bigger potential customers, as oftentimes they may require more complicate actions compared to smaller prospects. One of the sales tools currently missing was the competence map showing which competencies company owns at certain point of time (Person A). Final issue Person A mentioned was emphasizing more company story rather than focusing too much on the offerings. The person hoped that the story would be involved in sales speech and in sales presentation.

Person B. According to replies given in the interview, Person B highlighted lack of sales tools as well as how the sales process was conducted at that moment. Person B emphasized the importance of finding relevant data concerning the prospect before the first contact, other sales action mentioned were giving more specific SLA's, highlighting customer testimonials as well as success stories in previous projects and also he pointed out how important it would be to have an exclusive product portfolio. Some technical aspects were also pointed about the current sales process, for example, cutting the time between the first meetings and closing the deal and also transferring the data more accurately between the phases. Final issue pointed was the lack of tangible arguments, for example a visual model about the actual benefits after implementing the service was mentioned by Person B.

Person C. In the discussions Person C pointed out some of the gaps in the current sales process as well as some ideas for improvement. Most spoken theme in the discussion were the sales process structure and how to advance from one phase to another. The interviewed sales person found it difficult to proceed between phases systematically as the sales process did not offer enough support in the way of guiding the sales person through certain actions. Person C, for example, pointed out the steps of selling meaning that sales person ought to have a plan for the prospect customer which would eventually lead to closing the deal. It was also mentioned that this would cut the lead time as the following steps would be already prepared. Now, Person C, stated that as the actions are not clear the time can be consumed in internal challenges rather than spending the time with the future customer, for example. Final point of development spotted was the meetings between the sales team members, it was said that developing the current process requires discussions inside the team.

Person D. Sales team member in question was overall relatively satisfied with the current sales process. The person mentioned that major improvements are not needed but rather the current sales tools ought to be polished. Person D missed exclusive product portfolio for ease the selling and transferring the data more efficiently between different phases and utilizing more computer-aided system. It was mentioned that the case company ought to have one document template which ought to penetrate the whole process.

Person E. According to replies given in the interview, Person E missed some of the sales which would ease the buying process as well. Person E represented the customer site and therefore was more concerned about the arguments which were presented by the case company. The person stated that the main focus ought to be around the product or service, targeting more on the know-how and service-ability rather than paying too much attention on the product features. It was also added that most the products in the market have similar features and therefore the decision is oftentimes based on something else. Some practical examples that was mentioned, for example, emphasizing previous success stories and customer testimonials in order to prove the arguments.

Person F. Representing the customer perspective, Person F as well as Person E highlighted the fact that sales process ought to target for making the buying as easy as possible. The person stated that before the first contact the seller ought to know basic facts about the prospect, also should be aware what kind of product or services would fit for the future customer and why. This would enable presenting the actual benefits and reduce objectives. The person highlighted that there is no point to try selling everything to everybody, rather than that the offering ought to customized just for the case. In addition the story ought to be supported by customer testimonials which would indicate that the case company is able to deliver the promises. The person also mentioned that presenting the service is essential for the customer, as the buyer is rarely aware of IT infrastructure systems. The final point mentioned was the fact that the company should be able to somehow prove how they overcome the competitors.

Person G. According to the replies given in the interview, Person E emphasized knowing the prospect before meeting the first time in order to have selling tactic planned. He mentioned that the buyers get some many contacts from various sales people that the sales speech ought to be well-prepared and customized for the prospect. The sales expert also highlighted the importance of presenting customized solutions prepared for the prospect which would benefits the customer in the way that it would improve the customer's own business, and not just benefit the sales person. In that case the service model would support the sales speech as it would visually show how the future system would overcome the current system. Person E also highlighted building the trust with the prospect, suitable sales tools for this would be customer testimonials and presenting proves about the know-how from the business field, for example, presenting results from customer surveys. In addition the sales force ought to target for building a long-term relationship instead of quick sales. The final statement from the sales specialist was that the system specialist should be involved in the sales process as early as possible.

The process currently in use identifies the key elements such as finding the needs, conducting the necessary discussions, offering a quotations and stabilizing the service in order to achieve new business. Based on the interviews, the current sales process is considered as giving only frail guideline to the sales force how to conduct the whole process in order to achieve the goals. In addition the tools to be utilized are not mentioned in the process map, but still they exist and they are taught to sales force.

Every phase referred to in Figure 6 includes actions for supporting the sales process and helping the relevant information moving from one phase to another. The sales process proceeds rarely systematically as presented, in the end selling is creative and requires a certain amount of improvising. Nevertheless the current process works as guidelines for the sales team to create platform for successful selling.

Some of the topics which raised common concerns and were spotted frequently in the opinions of the interviewed people are summarized separately in Table 4 below. It also mentions who mentioned the issue.

TOPIC	Mentioned by
Showing a vision of the service model	A, C, E, F and G
Presenting facts based arguments for the prospect, why to buy from the company	A, B, C, E and F
Emphasizing the company story including references, partners and history	A, B, E, F and G
Finding the relevant data about the prospect before first meeting	B, C, E, F and G
Focusing more on the partnership and long-term relationship rather than focusing on one product or service	C, E, F and G
Transferring the data from phase to another efficiently	B, C and D
More visible product portfolio to present in the meetings	B, C and D
Regular meetings and tool usage	C and D

Table 4. Comparison of key issues mentioned in the interviews.

Overall the key elements requiring improvements are the actions executed in face-to-face meetings with the prospect such as having a distinct product catalogue and how to visualize the company service model clearly and how to emphasize the story around the products and services. As well as the key customers, also the expert mentioned the importance of the partnership and long-term relationship instead of focusing on the product or service itself when communicating with the buyer. In order to fulfil this set target the preliminary work, such as finding relevant data about prospect is considered compulsory. On the other hand some of actions seemed to be missing entirely or the use of proper tools was not clear for all the members of the sales team. These were the data transferring methods from one phase to another, even though current process sets guidelines for how to proceed inside the process, this wasn't clear for the sales personnel. Also some of the sales team members wished regular sales team meetings in order to keep the team updated of current situation.

4.3 Identifying the Tools Required in the Current Sales Process

Based on the fact that some of the elements mentioned are already existing and only the usage is unclear for the team or the tools cannot be systematically controlled the focus will be put to the things that are missing from the current process. As identified in the current state analysis, these 5 key points are:

1. Visualizing the current service model
2. Presenting a facts based arguments for the prospect, helping the prospect to make the final decision
3. Emphasizing more the company story including references and success stories
4. Making are more distinct product catalogue for helping the prospect to choose the right services and products
5. Helping the data transferring between the different phases.

Table 5 below highlights the gaps recognized in the current process.

Phase 1	Phase 2	Phase 3	Phase 4	Phase 5	Phase 6	Phase 7	Phase 8
First Meeting	First Offer	Mapping	Detailed Offer	Decision	Internal Start	Service/ Project Launch	Stabilize
Company presentation References and followers Prospect information (internet) Prospect information (CRM, partners, old customers) Prospect information (Asiakastieto) Confluence with the prospect Questions and notes, Green Card	Partner assistance (wholesale, Microsoft etc.) Test ball offer (company price list) Offering the detailed mapping project CRM notes CRM opportunity Personal notes from the first meeting	Mapping document Mapping project onsite Mapping report Customer meeting, going through the report CRM notes	Preparing the contract with CRM Detailed arguments Detailed pricing / calculating differences Special pricing Meeting with the prospect Phone calls and emails after meeting Offer based on mapping notes	Meeting, going through the offer Arguments Tuning the contract / re-offer Signing the contract Not signing the contract CRM notes including the contract	Create customer to internal system Add company to the financial system, including pricing Inform internally (email and monthly meetings) Meeting with the service manager Open ticketing system for the customer Notes adding to company intra	Meeting with the service manager, sales and system specialist Meeting with the customer Project plan (Excel) Project meetings regularly Phone calls and emails with the customer Billing SharePoint notes	Ending the project Plan monthly or weekly onsite support visits Customer satisfaction surveys ICT-meetings Reporting

Table 5. Sales process with the needs for improvements highlighted.

In the top left hand corner, in Table 5 above, the first two red tags are placed on the company presentation and references and followers. Based on the on interviews and analysis, the case company needs to visualize their service model more clearly in order to convincing the prospect, in addition the use of references should be emphasized extensively. The remark on Phase 2 is placed on test offer, according to information collected the product catalogue would ease the sales person in the way that one would have something to present at the beginning of the sales process. Even though the final offer is probably more detailed but still having a starting point could rise the level of awareness in the customer side when the prospect would have an idea what the final proposal would look like. The final offer often consists of various blocks such as software or services. In addition, based on the replies from the interviews, if the product catalogue could present some relevant arguments about the benefits of software or services those could be integrated to the following actions in the sales process. In that way the process would follow the same logic from the beginning and emphasizing the same benefits throughout the whole process.

This section went through the needs inside the current sales process of the case company. The following section identifies and describes the tools to support sales process better.

4.4 Recognizing Areas for Improvement for the Existing Sales Tools

Observations about the sales tools requiring improvement are based on the interviews with the sales team of the case company, key customer interviews and sales expert interview.

Overall, according to the replies given in the interviews, there were two separate themes which occurred several time. The first theme identified was, as for example Person A stated, that some specific sales actions were missing in the current sales process. Such sales actions were, for example, visual service model which would support the sales person in the sales arguments and references and customer testimonials from previous successful projects backing up the sales person's sales arguments. Also Person F, who represented the customer's site, emphasized the importance of having those references available in order to build the trust with the customer and lowering the barrier for purchase. Therefore it can be stated that some practical and effective sales tools are missing from the current sales process.

The second theme, according to replies from the interviews, which arose from the interviews was the fact that some of the tools were not specified clearly. Person B, for example, mentioned that information does not flow accurately between phases. Even though documenting is mentioned in the current sales process the usage of that specific sales tools is not clear. It was mentioned that some people had their own way of doing it. Even if, the sales is oftentimes improvising and rarely the proceeds by following the same logic, the sales tools inside the process ought to be specified in the way that deviations are minimized. Therefore some of the sales tools require adjustments.

4.5 Summary of the Analysis of the Current Sales Process and Tools

Section 4.1, *describing the current sales process*, studied the current sales process structure and identified actions inside the sales process. It briefly described the functions and the goals of each sales process phase.

Section 4.2, *recognizing areas for improvement*, collected data from the interviews concerning the current sales process of the case company. In addition it collected the issues mentioned by the people interviewed and collected those for points of development. At this stage it was discovered that the current sales process requires improvement concerning the process structure.

Section 4.3, *identifying the tools required in the current sales process*, covered the issues concerning the current sales process of the case company. Especially focusing on the sales process structure and sales tools integration. At this point it was discovered that some specific sales tools are missing from the current sales process.

Finally Section 4.4, *recognizing areas for improvement for the existing sales tools*, focused on the sales tools of the current sales process. It was discovered that some of the tools are not specific enough and therefore require more attention. Based on the findings in Sections 4.3 and 4.4 the sales process model is developed further.

5 Business-to-Business Sales Tools

This section investigates the fundamentals of sales tools from existing literature focusing on the features of business-to-business sales tools.

5.1 Business-to-Business Sales Tools in General

Sales as a phenomenon has been around for long time, such the exchange of products or services for money. Moncrief and Marshall (2005) argues that nowadays sales are more deeply integrated to the company strategy rather than just having a static sales team in the company. In addition sales has become more process-like function including various selling methods (Marshall et al. 1999). On the other hand, the nature selling has also evolved into relationship selling where companies seek for long-term partnership with the customer (Moncrief and Marshall 2005) creating value for both sides. This evolvement has also changed the demands for the sales team's inside the company. Sales person is required to have extensive understanding about products and services being sold by the own company and, on the other hand, a broad understanding about the customer's business environment.

The development of the sales process described above also requires different set of tools for the sales process. Tools can be described as set of actions which supports sales process and enables the process to successfully proceed towards the sales objective which is to exchanging products or services for money and repeating the business as often as possible.

To emphasize more how the sales functions have evolved in the recent years, the research by Moncrief and Marshall is studied closely. They use the seven steps of selling as a base, seven steps of selling dates back to 1920's and still is widely utilized principle in selling business Moncrief and Marshall (2005). Seven steps includes prospecting, preapproach, approach, presentation, overcoming objections, close and follow-up. In the research Moncrief and Marshall studied how the seven steps have evolved in recent years, the results are presented in Table 6 below.

Traditional seven steps of selling	Transformative factors	Evolved selling process
(1) Prospecting	Telemarketing	(1) Customer retention and deletion
	Internet selling	
	Organizational prospecting	
(2) Preapproach	Laptop account data	(2) Database and knowledge management
	Support staff	
(3) Approach	Build a foundation	(3) Nurturing the relationship (relationship selling)
(4) Presentation	PowerPoint/multimedia	(4) Marketing the product
	Listening	
	Team selling	
	Multiple calls	
	Value-added	
	Buying centers	
(5) Overcoming objections	Predetermining needs	(5) Problem solving
(6) Close	Identifying mutual goals	(6) Adding value/satisfying needs
(7) Follow-up	Increased effectiveness of communication through technology	(7) Customer relationship maintenance

Table 6. The evolution of the seven steps of selling by Moncrief and Marshall (2005).

The objective of this Table 6 above is to present how the nature of selling has evolved highlighting more the collaboration with the customer. For example steps 5 and 6 includes more active functions such as problem solving and adding value from sales force in order achieve the process targets. These kind of changes needs to be taken into consideration when developing new tools for the case company in following sections.

5.2 Suitable Tools for Case Context and Categorizing Them

This section is based on the research conducted by Marshall et al. (1999). The main reason for utilizing this this research is the fact that Marshall et al. have identified the sales tools currently in use in addition they have identified a trend how they have emerged in the recent years. Also they have categorized the new tools. This model will be utilized when developing a new tools for the case company.

The goal of the research by Marshall et al. (1999) was to study how the activities inside the sales process has developed in the recent years. The baseline for the research was the earlier research by Moncrief (1986) where he described 121 different activities conducted by the sales force inside the sales process with varying frequency. Marshall et al. (1999)

aimed at updating the old research by creating a fresh list of activities and putting it to comparison with the previous research in addition to find out the new trends and main features of the new trends. The list of activities discover by Moncrief (1986) is presented in Appendix 2.

Some of the activities have outdated and did not show up in the latest research anymore, still most of the activities discovered earlier still occupy sales force today. The valuable part of the new research was the fact that additional 49 activities were discovered and common feature for most of them was technological development Marshall et al. (1999).

The new 49 activities found were divided in five different categories communication, sales, team building/team selling and database management in addition the activities were categorized to technology based and non-technology categories. The new activities are presented in Table 7 below. Valuable information in addition to the sales tools presented below is how Marshall et al. (1999) described the tools usage in their research. These explanations are also studied below.

	Communication	Sales	Relationship	Team	Database
Technology	E-mail Dictaphone Internet Laptops–CD ROM* Voice-mail Fax Cellular phone Pager Webpage* Newsletters Audio-video conference Provide technical info Overnight services Maintain virtual office	Set up appointments Script sales pitch from database Use software for customer background Laptop for presentation* VCR for presentation Provide technology ability to customer	Web Page*	Conference calls	Collect new information from database Enter information/data on laptop* Update customer files
Non-Technology	Practice language skills	Adaptive selling Conduct research at Customer's business Avoid potential litigation Plan for multiple calls to close deal Sell value-added services Respond to referrals Write thank-yous* Target key accounts Pick up sales supplies Consultative sales Listen Ask questions Read body language Sell unique competencies	Bring in vendor/ alliance Develop relationship Hand-hold customer Write thank-yous* Purchase dealers Call on CEOs Build rapport with buying center Network Build trust Train brokers	Mentor Make sale and turn it over to someone else Coordinate with sales support	

* Appears in more than one cell.

Table 7. New selling activities (Marshall et al. 1999).

In Table 7 above, the new tools are presented. Below the sales activities are discussed in more detailed. Valuable information in addition to the sales tools presented below is how the sales tools ought to be utilized.

Communication

The first column is about new activities in the field of communication, Marshall et al. (1999) states that most significant changes has taken place in the field of communication. The tools are mainly *technology-aided*. New tools enabled sales people to engage with customers more often, sharing valuable information and improving service quality. In addition regular contacting enables sales people to ensure customer satisfaction. This indicates that the relationship between the sales people and the buyers is more collaborative than before.

Internet as a tool of communication has brought information available for bigger group of people meaning that companies are not just communicating with each other but at the same time sharing information about what they do for anyone who is interested. As such it means that individual company has to deliver the same message through every channel of communication to make it convincing. This includes marketing material and the sales speeches as well.

Sales

The second column speaks about sales. In the *technology related* section the tools are largely similar than described above in the communication part. Indicating that communication tools are utilized when doing business with the customer. The research claims that one of the most significant advances was the fact that sales people were able to study the target before entering into negotiations. This enabled more professional selling as the seller understood already something about the business field of the customer. In addition the level of offerings would come closer to the actual need of the customer when the sales person would already have an idea what to emphasize in the sales speech. On the other hand, it also meant that the level of the presentations needed to improve, and the sales person was expected to point to the benefits so that the customer would able to appreciate them. This created new tools for selling such as slideshows and video presentations.

In the *nontechnology* part the research highlighted two different themes. The first theme discovered was the use of basic people-skills. The sales people involved in the research emphasized the meaning of asking and listening, and also analysing the buyer's personality in order to communicate in the right way. This indicates that selling tools and actions have become more personal and customized based on the customer.

The second theme discovered was the fact that customers seemed to appreciate more consultative selling or adaptive selling methods. In other words focusing more on the customer needs and finding the right products or services for the customer instead of focusing in own offerings too much.

Relationship

The third column is about relationship. Research communicates the importance of web page as communication *technology tool*. It was seen as a tool for maintaining relationships in the way that important information related to marketing or products or services could be shared through web page.

Nontechnology tools highlights the importance of building rapport with buyers, in other words a relationship of mutual trust and respect. It specially concerns personal service with the key players such as CEOs. Another element mentioned was networking, the research states that networking is a useful tool for example finding new potential prospects.

Team

The fourth column speaks about team tools. Conference calls is the only tool in *technology-aided* category mentioned by the research. Conference calls as team tool means communication between team members located in different sites.

In addition, two different themes were discovered in the category of *non-technology tools*. First theme discovered was mentoring which has become significant action in the sales process. As mentioned earlier selling requires more knowledge about the business environment and the challenges that customers face in daily bases. Therefore the sales force needs to constantly up-to-date about the relevant business trends, having an internal mentor supports the sales team and at the same making sure that the critical information is not owned by only few people.

The second theme brought up was the fact that accounts were managed by several team members instead of one individual. It indicated that the sales work is evolved into a process-like function where responsibilities are divided to various individuals. It also highlighted the importance of communication the tools inside the process in order to be able to deliver the message to the next phase without disconnections.

Database

The fifth and final column is about database. New *non-technology* tools were not discovered in the study. But in the *technology-aided* category changes were identified. Probably the biggest influencer is the amount of data and new tools which helps to analyse and gather the data easily. For example Customer Relations Management (CRM) software aim for utilizing the data concerning the customers, it enables to document the customer's business environment, competitors, and actions inside customer relationship. Gathering database about potential prospects was also identified as one of the tools to utilized, decreasing the amount of time spent to finding new business and contacting unveiling companies.

As a conclusion, the research by Marshall et al. (1999) states that sales tools are critical part of sales performance also emphasizing the integration of tools to the whole process in order to ensure positive results. The integration also includes acting according to sales strategy. Based on that, the sales actions cannot be indefinite actions executed irregularly. Rather, those need to be specified clearly and categorized to make the identification easier. Therefore this study utilizes the key findings and the theme were sales tools are divided to two different categories, technology-aided and nontechnology. This will make the sales process model more structured and easier to follow.

5.3 Summary of the Best Practice for the Sales Tools

As a conclusion from previous Sections 5.1 and 5.2, the sales functions have evolved into more systematic process-like performance. Basic functions of business-to-business sales tools are similar to the recent history but new tools have emerged. In addition, the usage of these tools has become more systematic from the start till achieving the set target. To be able to utilize each tool at high level the tools ought to identify in the process, this also enables the tool development.

Based on the literature review executed in Section 5, it can be stated that sales tools are the enablers of successful sales process performance. They act as guidelines for the sales force pointing to what to do and how to do it. The sales tools ought to be developed in the way that those integrate to the company sales strategy and supports the sales process. From the sales person’s point of view, the sales tools ought to be built, so that they support the person’s selling performance by offering effective practical instructions on how to perform inside the sales process.

This section also pointed to the importance of categorizing the tools into technology-aided and nontechnology based tools. This categorizing enables the study to choose the correct approach when presenting solutions. In other words, when knowing beforehand whether the problem is more human or technological helps choosing the right fix. The tool identification and categorizing is presented in Table 8 below.

	Phase 1 First Meeting	Phase 2 First Offer	Phase 3 Mapping	Phase 4 Detailed Offer	Phase 5 Decision	Phase 6 Internal Start	Phase 7 Service/ Project Launch	Phase 8 Stabilize
TOOL 1	Company presentation ***(Technology-aided)***	Partner assistance (wholesale, Microsoft etc.) ***(Nontechnology)***	Mapping document ***(Technology-aided)***	Preparing the contract with CRM ***(Technology-aided)***	Meeting, going through the offer ***(Nontechnology)***	Create customer to internal system ***(Technology-aided)***	Meeting with the service manager, sales and system specialist ***(Nontechnology)***	Ending the project ***(Nontechnology)***
TOOL 2	References and followers ***(Nontechnology)***	Test ball offer (company price list) ***(Nontechnology)***	Mapping project onsite ***(Nontechnology)***	Detailed arguments ***(Nontechnology)***	Arguments ***(Nontechnology)***	Add company to the financial system, including pricing ***(Technology-aided)***	Meeting with the customer ***(Nontechnology)***	Plan monthly or weekly onsite support visits ***(Nontechnology)***
TOOL 3	Prospect information (internet) ***(Technology-aided)***	Offering the detailed mapping project ***(Nontechnology)***	Mapping report ***(Technology-aided)***	Detailed pricing / calculating differences ***(Nontechnology)***	Tuning the contract / re-offer ***(Nontechnology)***	Inform internally (email and monthly meetings) ***(Technology-aided)***	Project plan (Excel) ***(Technology-aided)***	Customer satisfaction surveys ***(Technology-aided)***
TOOL 4	Prospect information (CRM, partners, old customers) ***(Technology-aided)***	CRM notes ***(Technology-aided)***	Customer meeting, going through the report ***(Nontechnology)***	Special pricing ***(Nontechnology)***	Signing the contract ***(Nontechnology)***	Meeting with the service manager ***(Nontechnology)***	Project meetings regularly ***(Nontechnology)***	ICT-meetings ***(Nontechnology)***
TOOL 5	Prospect information (Asiakastieto) ***(Technology-aided)***	CRM opportunity ***(Technology-aided)***	CRM notes ***(Technology-aided)***	Meeting with the prospect ***(Nontechnology)***	Not signing the contract ***(Nontechnology)***	Open ticketing system for the customer ***(Technology-aided)***	Phone calls and emails with the customer ***(Technology-aided)***	Reporting ***(Technology-aided)***
TOOL 6	Confluence with the prospect ***(Nontechnology)***	Personal notes from the first meeting ***(Nontechnology)***		Phone calls and emails after meeting ***(Technology-aided)***	CRM notes including the contract ***(Technology-aided)***	Notes adding to company intra ***(Technology-aided)***	Billing ***(Technology-aided)***	
TOOL 7	Questions and notes, Green Card ***(Nontechnology)***			Offer based on mapping notes ***(Nontechnology)***			SharePoint notes ***(Technology-aided)***	

Table 8. Identifying the sales tools and categorizing them.

Table 8 above presents the new process model where the sales disconnected sales actions are separated into individual sales tools and categorized into technology-aided and nontechnology.

5.4 Building Conceptual Framework

This section summarizes presents the conceptual framework of the thesis. The conceptual framework is built from the most significant practical ideas studied earlier in the thesis into one visual model which presented in Table 9 below. These ideas are utilized later on in the research offering the guidelines how to conduct the study in order to produce valid results.

The conceptual framework consists of the sales process presented in eight steps. It collects the best practice found, first, from the model of *sales process* and then *the sales tools*. It also connects disconnected actions into specific sales tools. These tools are grouped into two sections – *technology-aided* and *non-technology* tools.

The sales process model is based on the ideas presented in the researches by Kotler and Armstrong (2008) and Jobber and Lancaster (2009). Both approaches suggested that the sales process should have clear structure following the phases in logical order as was mentioned in Section 3.

The sales tools inside the process are placed according to the ideas from the sales process model research executed in Section 3. Kotler and Armstrong (2008) and Jobber and Lancaster (2009) emphasized the integration between the process phases and sales tools. When the tools are clearly placed under each phase, it creates a more structured process showing how to advance from phase to phase and which tools should be used in each phase. In addition these tools are categorized under *technology-aided* and *non-technology* categories. This was executed with the guidelines from the research executed by Marshall et al. (1999). These categories aim to present the difference in the nature of the tools pointing to the actions utilizing “people” skills from the tools that modern technology can provide assistance for.

Table 9 below presents the conceptual framework of the study.

	PHASE number	Phase 1.	Phase 2.	Phase 3.	Phase 4.	Phase 5.	Phase 6.	Phase 7.	Phase 8.
TOOL TYPE	PHASE	First meeting	First offer	Mapping	Detailed offer	Decision	Internal start	Service/Project launch	Stabilize
TECHNOLOGY-AIDED	TOOL 1	Company presentation	CRM opportunity	Mapping document	Preparing the contract with CRM	CRM notes including the contract	Create customer to internal system	Phone calls and emails with the customer	Customer satisfaction surveys
	TOOL 2	Prospect information (Asiakastieto)	CRM notes	CRM notes	Phone calls and emails after meeting		Add company to the financial system, including pricing	Billing	
	TOOL 3	Prospect information (internet)		Mapping report			Inform internally (email and monthly meetings)	Project plan (Excel)	
	TOOL 4	Prospect information (CRM, partners, old customers)					Open ticketing system for the customer		
	TOOL 5						Notes adding to company intra		
NON-TECHNOLOGY	TOOL 1	References and followers	Partner assistance (wholesale, Microsoft etc.)	Mapping project onsite	Detailed arguments	Arguments	Meeting with the service manager	Meeting with the service manager, sales and system specialist	Ending the project
	TOOL 2	Confluence with the prospect	Offering the detailed mapping project	Customer meeting, going through the report	Meeting with the prospect	Meeting, going through the offer		Meeting with the customer	Plan monthly or weekly onsite support visits
	TOOL 3	Questions and notes, Green Card	Test ball offer (company price list)		Detailed pricing / calculating differences	Signing the contract		Project meetings regularly	ICT-meetings
	TOOL 4		Personal notes from the first meeting		Offer based on mapping notes	Not signing the contract		SharePoint notes	Reporting
	TOOL 5				Special pricing	Tuning the contract / re-offer			

Table 9. Conceptual framework of this study.

Table 9 above presented the most significant features summarized in the process model structure and placing and categorizing the tools used in each of the stages of the sales process.

In the current state analysis in Section 4, it was mentioned that the current sales process includes various actions performed in irrational order not giving supportive guidelines for the sales force. Therefore the sales process needed new model. The researchers studied pointed the key elements of sales process model which were utilized when creating the new model. This model emphasizes the integration of the phases and actions inside the process.

The ideas summarized the conceptual framework of the study are utilized in the following section when creating the proposal for a toolkit supporting the sales process in the case company.

6 Building a Proposal for a Toolkit for Supporting the Sales Process in the Case Company

This section builds the proposal for the toolkit for supporting the sales process in the case company. It starts with the analysis of each sales process phase and the tools. The functions that need improvement are replaced with the new practical sales tools and the features of the new tools are explained. These new tools form the base for the new toolkit proposed to the case company.

6.1 Sales Process, Phase 1, First Meeting

The first phase in the process is the *first meeting with the prospect*. The first phase is presented in Figure 7 below. It shows the gaps identified in the first phase and also proposes the new model and tools for Phase 1.

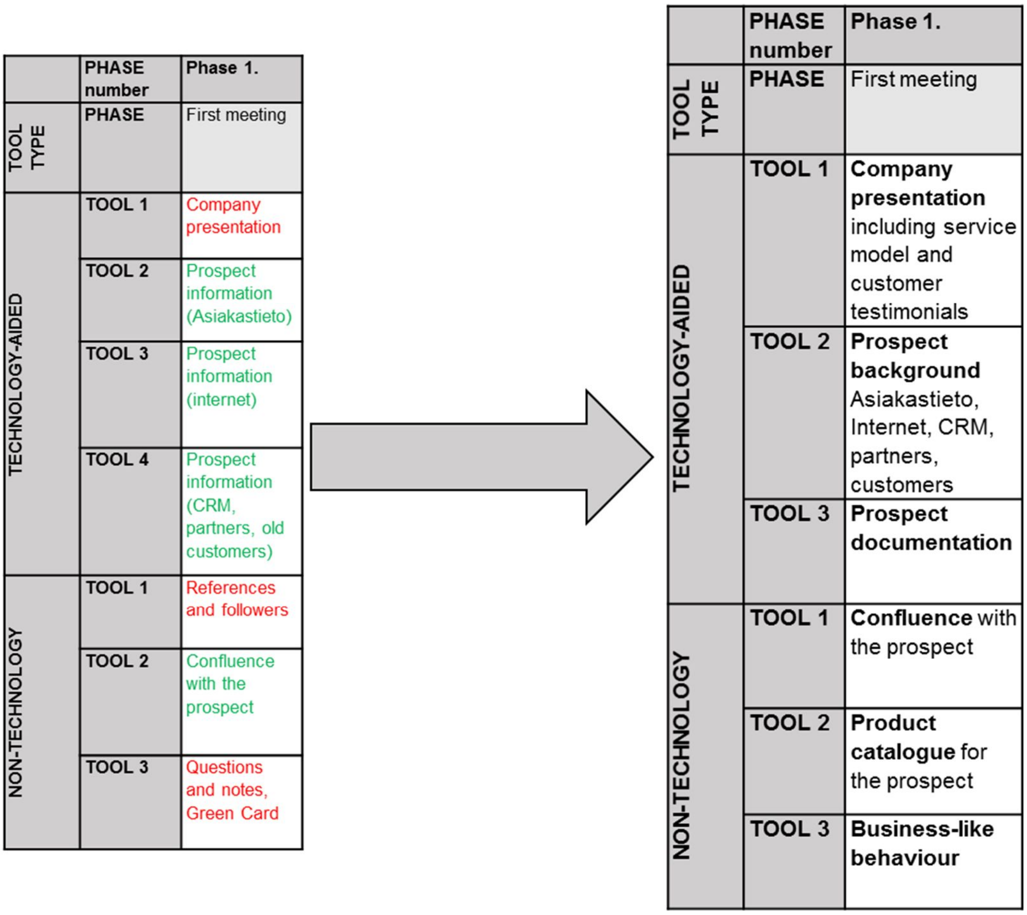

Figure 7. Sales process Phase 1.

As seen from Figure 7, the tools identified as positive in the current sales process Phase 1 were *the information collection methods* concerning the prospect and *finding the confluence with the prospect*. Positive tools are marked with green colour in the picture. These qualities were highlighted in the interviews and also in the data collection sections earlier in this research. For example, Kotler and Armstrong (2008) stated that it is important for the sales person to know who the customer is and what they do in order to finding the common language. In the current sales process, the case company guides the sales force to utilize several different sources in order to find necessary data about the future customer. Such methods include, for example, utilizing Asiakastieto for financial information, prospect websites for more general knowledge and partners from the same business field for inside information. These tools ought to be kept in the process also in the future. Nevertheless in the proposal they are bundled into one tool. A second positive function identified was *finding the common target* and in order to meet this objective the previous seek for relevant information is crucial. Also this tool is part of the new proposal.

The tools requiring development in Phase 1 are *company presentation*, including reference usage and documentation (*questions and notes*); these are marked with red colour in the picture.

As such the company presentation is already part of the first meeting but it is lacking some features. One of the issues is the lack of visual service model map presenting what is company's approach for serving the customer in proper way. The case company offers IT services for several customers and has extensive experience of how to serve customers efficiently. Nevertheless the sales force oftentimes suffers from not having a visual map of the existing service model forcing them to explain the system orally. As one customer mentioned in the interview they expected the company to show how they are going to fulfil their IT needs. In addition the research studied in Section 5 Marshall et al. (1999) describes that one of the goals in the company presentation is to show how the product is used and how it provides value for the customer. Therefore the service model should be added to the company presentation. Also showing how the model has working in previous cases with customer testimonials might lower the barrier for buying when the prospect can see the model in action. These customer testimonials ought to be added to the developed process.

The second issue requiring improvement is the *documentation* system. At the moment the company has several functions for taking notes and adding those to different systems. This can lead to the situation where the information is scattered and valuable key points can be difficult to find. Therefore the company needs more uniform actions in order to store the information properly. For example using only one document template throughout the process could improve the information collection and enable information usage afterwards. Based on that the proposal includes improved prospect documentation as a new tool in the sales process. Last added feature is *business-like behaviour* in the first meeting. This feature is not mentioned in the current sales process but as such it should be added as a reminder.

6.2 Sales Process, Phase 2, First Offer

The second phase in the process is the *first offer*. The second phase is presented in Figure 8 below. It shows the gaps identified in the second phase and also proposes the new model and tools for Phase 2.

	PHASE number	Phase 2.
TOOL TYPE	PHASE	First offer
TECHNOLOGY-AIDED	TOOL 1	CRM opportunity
	TOOL 2	CRM notes
NON-TECHNOLOGY	TOOL 1	Partner assistance (wholesale, Microsoft etc.)
	TOOL 2	Offering the detailed mapping project
	TOOL 3	Test ball offer (company price list)
	TOOL 4	Personal notes from the first meeting

	PHASE number	**Phase 2.**
TOOL TYPE	**PHASE**	First offer
TECHNOLOGY-AIDED	**TOOL 1**	**CRM** opportunity in CRM and information in CRM
	TOOL 2	**Prospect documentation**
NON-TECHNOLOGY	**TOOL 1**	**Partner assistance** (wholesale, Microsoft etc.)
	TOOL 2	**Offering the detailed mapping project**
	TOOL 3	**First offer** using product catalogue

Figure 8. Sales process Phase 2.

As seen from Figure 8 above, the desired tool in the current process is the *CRM usage* which functions as major *technology-aided* sales system in the company. All the offers are done in CRM and important information such as contact details are also added to CRM. Wholesalers are oftentimes also needed when making the first offer for the prospect. *Efficient networking* with wholesalers permits the sales team to have the necessary updated product information and prices. These channels should be utilized in the future as efficiently as nowadays.

Besides CRM and wholesaler networks, *offering detailed mapping* also ought to be preserved in the process. Commonly it mean getting inside the prospect's office and meeting the actual buyers in addition to getting familiar with the IT infrastructure lowers the barrier for buying. After mapping it is sometimes easier to offer suitable products and services when it is possible to point the functions requiring attention in the prospect's current system.

The functions requiring development are marked with red colour; they are *first offer* and *information collection* and storing. As well as in the first phase there exists quite many ways taking notes and adding those into systems. Therefore the case company needs more uniform actions in order to store the information properly. The proposal suggest that specific document template ought to be utilized in the way that information from each phase can be added to one document.

A second function requiring attention is *the first offer*. Quite often the prospects requires a first offer just for evaluating the quality of offer or for comparing prices between competitors. According to interviews sometimes the offers from the case company are quite technical and neglecting the benefits and points that create value for the customer. Nontechnical buyer can be confused with terminology and technical specs and therefore mislead from the actual purpose. As a result the sales team should offer something concrete also taking notice of prospect's actual needs. For example an informative and visual *product portfolio* could be utilized. This could include short introduction of the product or service and the benefits after implementation and how would it improve the current situation. In addition printed product portfolio can be given to the customer for further investigation and at the same time leaving the contact details of the selling company.

6.3 Sales Process, Phase 3, Mapping

The third phase in the process is a *mapping*. The third phase is presented in Figure 9 below. It shows the gaps identified in the third phase and also proposes the new model and tools for Phase 3.

	PHASE number	Phase 3.
TOOL TYPE	PHASE	Mapping
TECHNOLOGY-AIDED	TOOL 1	Mapping document
	TOOL 2	CRM notes
	TOOL 3	Mapping report
NON-TECHNOLOGY	TOOL 1	Mapping project onsite
	TOOL 2	Customer meeting, going through the report

	PHASE number	Phase 3.
TOOL TYPE	PHASE	Mapping
TECHNOLOGY-AIDED	TOOL 1	**Mapping documentation and reporting**
	TOOL 2	**Prospect documentation**
NON-TECHNOLOGY	TOOL 1	**Mapping project onsite**
	TOOL 2	**Customer meeting**, going through the report

Figure 9. Sales process Phase 3.

Figure 9 above presents the sales process Phase 3. Mapping is valuable part of the current sales process of the case company. It is a function which differs the company from competitors. As such it plays an important role in the sales process and ought to be preserved in the process. Especially the *mapping project* at the customer site enables the system specialists and the consultants to get to know the people and the current infrastructure and in that build the trust between both parties. In addition it enables creation of customized offer which meets the prospect's needs rightly.

The points for consideration are the *mapping document* which should include the necessary details about technical details and consultative knowledge about the state of the infrastructure. In addition the sales forced should pay attention to the integration between the mapping document and the offer sent to prospect afterwards. Phase 3 as such is not requiring too much attention, the only actual tool to be proposed is the *prospect documentation*. Emphasizing the same continuum which was highlighted also in first two phases.

6.4 Sales Process, Phase 4, Detailed Offer

The fourth phase in the process is the *detailed offer*. The fourth phase is presented in Figure 10 below. It shows the gaps identified in the fourth phase and also proposes the new model and tools for Phase 4.

	PHASE number	Phase 4.
TOOL TYPE	PHASE	Detailed offer
TECHNOLOGY-AIDED	TOOL 1	Preparing the contract with CRM
	TOOL 2	Phone calls and emails after meeting
NON-TECHNOLOGY	TOOL 1	Detailed arguments
	TOOL 2	Meeting with the prospect
	TOOL 3	Detailed pricing / calculating differences
	TOOL 4	Offer based on mapping notes
	TOOL 5	Special pricing

	PHASE number	Phase 4.
TOOL TYPE	PHASE	Detailed offer
TECHNOLOGY-AIDED	TOOL 1	**Preparing the contract** with CRM
	TOOL 2	**Phone calls and emails** after meeting
	TOOL 3	**Prospect documentation**
	TOOL 4	**Product catalogue**
NON-TECHNOLOGY	TOOL 1	**Meeting** with the prospect
	TOOL 2	**Pricing** calculating differences, special pricing
	TOOL 3	**Arguments / handling objections**

Figure 10. Sales process Phase 4.

Sales process Phase 4 is presented in Figure 10 above. In phase 4 the *CRM* plays an important role as it functions as database for selling data. The final offer for the prospect is prepared in CRM. Second desired technology-aided tool in Phase 4 is *prospect contacting* after delivering the offer. The current sales process mentions prospect contacting and advises that it should be done after sending the offer. In the interviews the sales force confirmed that *communication* with the buyer is important, it aims at answering the questions that arose and convincing the buyer. The final technology-aided tool is *prospect documentation* which also functions as information source when communicating with the buyer and building the final offer. As the prospect document contains all the knowledge collected in previous phases it is also the base for arguments why to buy the product or service. In the earlier steps the *prospect document* was more a tool for information collection but at this stage it can be utilized for other purposes, for example, arguing about the qualities of the offer. In addition when combining the *arguments* from the product portfolio mentioned in the Phase 2 there is a combination of well-argued customer needs and confirmation that the products offered are suitable for filling the needs.

As mentioned in the data collection sections, prospect's can have doubts and objections about the acquisitions and the sales force need to be prepared for *handling objections*. Overcoming these barriers is usually easier when meeting the prospect face-to-face. In the end the objections could be more mental issues rather than fact-based logical reasons. Actions can involve bundling the products or negotiating special pricing with the wholesaler or software vendor. Sometimes comparing different solutions might help the prospect to make the final decision.

6.5 Sales Process, Phase 5, Final Decision

The fifth phase in the process is the *final decision*. The fifth phase is presented in Figure 11 below. It shows the gaps identified in the fifth phase and also proposes the new model and tools for Phase 5.

	PHASE number	Phase 5.
TOOL TYPE	PHASE	Decision
TECHNOLOGY-AIDED	TOOL 1	CRM notes including the contract
NON-TECHNOLOGY	TOOL 1	Arguments
	TOOL 2	Meeting, going through the offer
	TOOL 3	Signing the contract
	TOOL 4	Not signing the contract
	TOOL 5	Tuning the contract / re-offer

	PHASE number	Phase 5.
TOOL TYPE	PHASE	Decision
TECHNOLOGY-AIDED	TOOL 1	**Prospect documentation**
	TOOL 2	**Arguments** Product catalogue, Service model, Customer testimonials
NON-TECHNOLOGY	TOOL 1	**Communication** with the prospect
	TOOL 2	**Close the deal**

Figure 11. Sales process Phase 5.

Fifth phase in the sales process is presented in Figure 11 above. Phase 5 aims for *closing the deal*. At this stage the sales person should strive to meet the prospect and seek for winning the deal. As mentioned in the data collection, this often calls for basic psychological skills. Sales person needs to sense the right moment for closing and aim for leading the prospect to such situation.

Nontechnology tools ought to be utilized in a sense that *communication* strategy is well-planned and carefully executed. The goal ought to be winning the case, nevertheless if the prospect needs further convincing the technology-aided tools can be utilized as well. At this point the sales person should follow the same logic as in earlier stages. Highlighting the gaps mentioned in the prospect's *documentation* and presenting the qualities of the products and services stated in the product catalogue. In addition the customer testimonials ought to be used to *convince the prospect* as well as emphasizing the suitability of the service model offered by the seller. Altogether these sales tools functions as actions for helping the sales person to achieve the target. If the prospect still decides to retrieve from the deal the sales case ought to be moved back to previous phase or even closed for good if the probability is nil. In the sales team’s interviews, it was mentioned that quite often the deal is neither won nor lost but rather it remains unclear. In cases like that the sales force ought to be more determined to categorize the case either plausible or declare it finished for good.

6.6 Sales Process, Phase 6, Internal Start

The sixth phase in the process is the *internal start*. The sixth phase is presented in Figure 12 below. It shows the gaps identified in the sixth phase and also proposes the new model and tools for Phase 6.

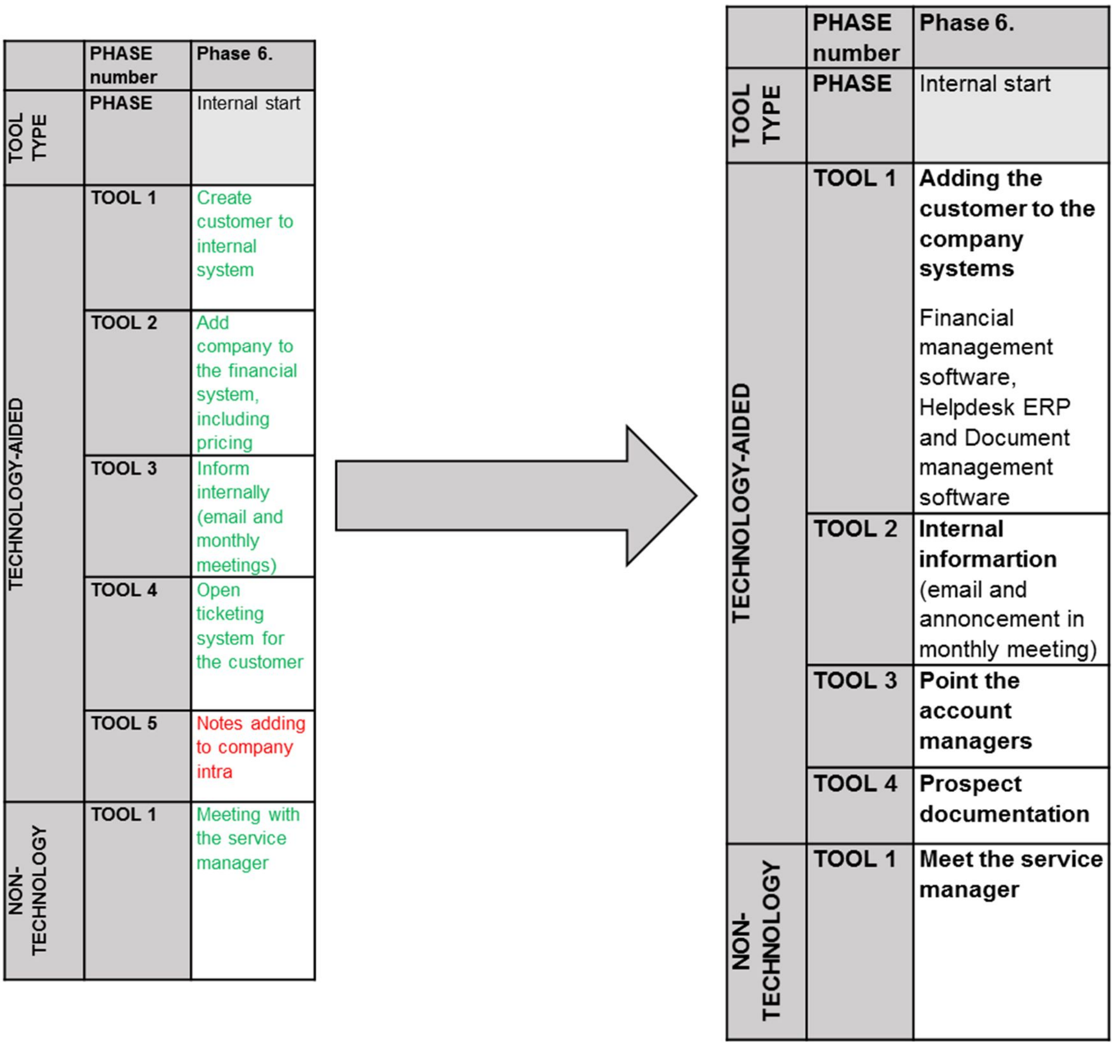

Figure 12. Sales process Phase 6.

Figure 12 above presents Phase 6 in the sales process. Phase 6 has a different nature compared to previous ones. As such, the phase includes more internal administrative functions rather than having customer involvement. Nevertheless at this point the sales person has put lot of effort to the case and *collected information* about the customer which ought to be passed to other key players in the process. In order to achieve the target information transfer is important. Proper practical tool for this is to utilize the same prospect document implemented in Phase 1. In that way, rest of the team is able to follow what have been discussed and what are the elements emphasized when pursued for the deal.

The case company has a policy which aims at *pointing an account manager* for each customer. Sales person might invite the account manager into negotiations even earlier in the process but at Phase 6 the collaboration with the sales person and the account manager ought to begin. Also *meeting with the service manager* is important because at the end this person is responsible about the product or service delivered. For *documenting* these meetings the company is proposed to utilize again the same prospect document used in previous stages.

Otherwise Phase 6 includes technical details such as *adding customer to the internal systems*. Even though those are administrative functions still those have important role in the process. Each error in this phase causes deviations in the process and causes extra work in following phases.

6.7 Sales Process, Phase 7, Project or Service Launch

Seventh phase in the current sales process of the case company is the *project or service launch*. Figure 13 below presents how the Phase 7 ought to be executed in order to achieve positive results.

	PHASE number	Phase 7.
TOOL TYPE	PHASE	Service/Project launch
TECHNOLOGY-AIDED	TOOL 1	Phone calls and emails with the customer
	TOOL 2	Billing
	TOOL 3	Project plan (Excel)
NON-TECHNOLOGY	TOOL 1	Meeting with the service manager, sales and system specialist
	TOOL 2	Meeting with the customer
	TOOL 3	Project meetings regularly
	TOOL 4	SharePoint notes

	PHASE number	Phase 7.
TOOL TYPE	PHASE	Service / Project launch
TECHNOLOGY-AIDED	TOOL 1	Communication with the customer
	TOOL 2	Billing
	TOOL 3	Project plan (Excel)
	TOOL 4	Prospect documentation
NON-TECHNOLOGY	TOOL 1	Following the company project process
	TOOL 2	Meetings regularly with the customer
	TOOL 3	Meeting with the service manager, sales and system specialist

Figure 13. Sales process Phase 7.

Figure 13 above presents the sales process Phase 7. Proposed development at this stage is not major. The only actual issue pinpointed in the current process is the *documentation tool*. As mentioned earlier the same prospect document ought to be used throughout the process. At a project or service launching phase, it could function as a database for meeting memos for example. With minor customising the same template could also be passed to the customer so that it would be easier to follow how the project is advancing.

Other tools at this stage function as checklist for the project managers to follow. Besides working with the project the *communication* should be executed parallel sharing the knowledge with the customer as much as possible.

The case company follows an ITIL based *project management* system which also includes *project planning*. It is preserved in the proposal as well not requiring more attention. Another important action in Phase 7 is *billing*. The case company ought to emphasize the importance of precise billing. For example what is the agreed price, how often the billing is executed and what is included and what is not. Issues concerning money might be sensitive and therefore should not be neglected.

6.8 Sales Process, Phase 8, Stabilizing the Service

The eight phase in the process is the *stabilizing the service*. The eight phase is presented in Figure 14 below. It shows the gaps identified in the eight phase and also proposes the new model and tools for Phase 8.

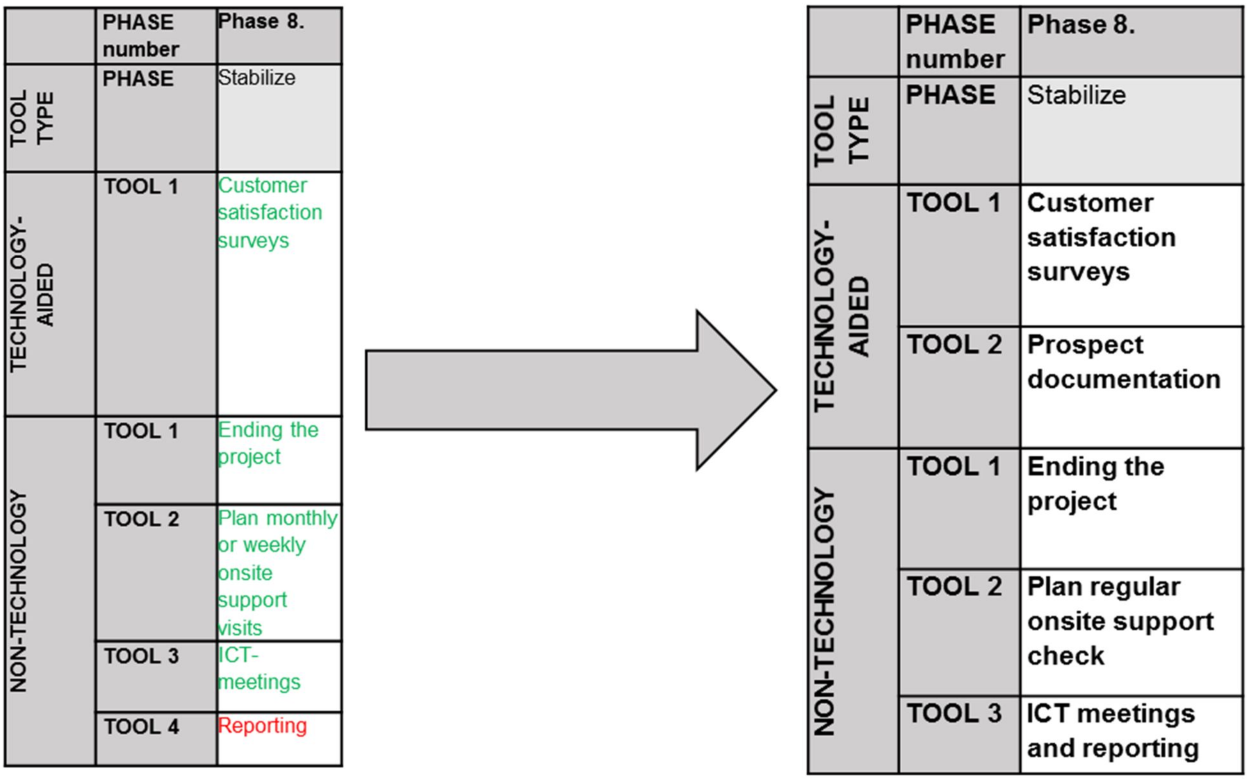

Figure 14. Sales process Phase 8.

Sales process Phase 8 is presented in Figure 14 above. Phase 8 as such includes all the necessary tools in order to perform well. Therefore this phase does not require improvements and all the current sales tools ought to be preserved in the proposal. The only minor detail is the *information collection*. The proposal suggests that prospect document should be used throughout the process till the phase where the service status reporting starts. As the documents has all the details mentioned it is valuable tool when presenting the benefits compared to time before implementing the services from the case company. In addition when executing *service review meetings* (ICT meetings) all the deviations and positive feedback can be registered to the same documentation. In that way the progression of issues can be monitored during the following meetings.

Summing up, the sub-sections above discussed the new sales process and presented a proposal how to fill the gaps in the current sales process. If an issue was discovered the research tries to offer a solution based on data from data collection section studied earlier. Some phases are stated to function well and therefore there is no need to make significant changes. Thus, some polishing was made with the terminology in order to have a clear and logic proposal to be offered to the case company. The next sub-section presents the first version of toolkit for supporting the sales process. It includes improved process model showing the tools to be utilized in each phase. In addition it wraps up what should be changed and why.

6.9 Proposing the First Version of Toolkit for Supporting the Sales Process

Table 10 below presents the first version of toolkit for supporting the sales process. It includes all the phases analysed in previous sections. In addition the significant key points are explained in more detailed.

TOOL TYPE	PHASE number	Phase 1.	Phase 2.	Phase 3.	Phase 4.	Phase 5.	Phase 6.	Phase 7.	Phase 8.
	PHASE	First meeting	First offer	Mapping	Detailed offer	Decision	Internal start	Service/Project launch	Stabilize
TECHNOLOGY-AIDED	TOOL 1	**Company presentation** including service model and customer testimonials	**CRM** opportunity in CRM and information in CRM	**Mapping documentation and reporting**	**Preparing the contract** with CRM	**Prospect documentation**	**Adding the customer to the company systems** Financial management software, Helpdesk ERP and Document management software	**Communication with the customer**	**Customer satisfaction surveys**
	TOOL 2	**Prospect background** Asiakastieto, Internet, CRM, partners, customers	**Prospect documentation**	**Prospect documentation**	**Phone calls and emails** after meeting	**Arguments** Product catalogue, Service model, Customer testimonials	**Internal informartion** (email and annoncement in monthly meeting)	**Billing**	**Prospect documentation**
	TOOL 3	**Prospect documentation**			**Prospect documentation**		**Point the account managers**	**Project plan (Excel)**	
	TOOL 4				**Product catalogue**		**Prospect documentation**	**Prospect documentation**	
NON-TECHNOLOGY	TOOL 1	**Confluence** with the prospect	**Partner assistance** (wholesale, Microsoft etc.)	**Mapping project onsite**	**Meeting** with the prospect	**Communication** with the prospect	**Meet the service manager**	**Following the company project process**	**Ending the project**
	TOOL 2	**Product catalogue** for the prospect	**Offering the detailed mapping project**	**Customer meeting**, going through the report	**Pricing** calculating differences, special pricing	**Close the deal**		**Meetings regularly with the customer**	**Plan regular onsite support check**
	TOOL 3	**Business-like behaviour**	**First offer** using product catalogue		**Arguments / handling objections**			**Meeting with the service manager, sales and system specialist**	**ICT meetings and reporting**
	TOOL 4				**Meeting** with the prospect			**Following the company project process**	

Table 10. First version of the toolkit for supporting the sales process.

As seen from Table 10 above, compared to current process model the most significant points of development are improved version company presentation which ought to emphasize more the customer testimonials and service model offered by the company, prospect documentation which should be following throughout the whole process, improved product catalogue for supporting the arguments for buying and crystalizing the first offer and supporting the whole process. Table 11 below summarises the proposed tools and shows how those are able to support the process in different phases.

PHASE number	Phase 1.	Phase 2.	Phase 3.	Phase 4.	Phase 5.	Phase 6.	Phase 7.	Phase 8.
PHASE	First meeting	First offer	Mapping	Detailed offer	Decision	Internal start	Service/ Project launch	Stabilize
Company presentation	X	X			X			
Prospect documentation	X	X	X	X	X	X	X	X
Product catalogue	X	X		X	X			
Arguments for selling	X	X		X	X			
Business-like behaviour	X	X	X	X	X			

Table 11. Utilization of the new proposed sales tools.

As presented in Table 11, the proposed new tools are not for a specific phase but rather for supporting the process as a whole. Conducting the sales process ought to be consistent delivering the same message throughout the process. Therefore the tools needs to be linked to each other in the way that the sales person is able follow the process utilizing the tools given. Also for the customer it is easier when the sales for emphasize the same benefits and follow the same logic in every point of collaboration. Table 12 below presents the features of the proposed new tools.

TOOL	Features
Company presentation	- Customer testimonials - Service model and benefits - How to use the product or service and how it will improve the current situation
Prospect documentation	- Notes from each phase - What was discussed and agreed, agendas, notes and memos
Product catalogue	- Presenting products and sercices sold - Presenting benefits and features and case examples
Arguments for selling	- Utilizing company presentation, prospect documentation and product catalogue - Following the same logic and delivering the same message
Business-like behaviour	- Important for making good impression and delivering a professional image about the company

Table 12. Features of the new proposed sales tools.

These new tools shown in Table 12 above are presented to the case company managers and sales team in subsequent Section 7 to collect the data from the company representatives and improve the proposal if necessary.

Summing up, this section analysed each phase of the current sales process pointing the plusses and the minuses inside the phase. Based on the analysis, each subsection suggested an improved version of the sales process phase. These suggestions were collected and merged into the new improved sales process. In addition, each new tool was explained in more detail discussing how the proposed tools can be utilized in the sales process.

7 Validation of the Proposal

This section presents the final proposal of the toolkit for supporting the sales process of the case company. This section starts with the results of the discussions held with the sales team of the case company. These discussions were based on the initial proposal and collected feedback and points of development.

7.1 Feedback on the Proposal from the Key Users and Managers

For collecting the feedback, the steering group discussed each phase of the sales process one by one. The first proposal was presented to the steering group and the sales tools explained more detailed before starting the debate. Discussions were held in the office of the case company and the meeting lasted for two hours. There were five persons participating the steering group meeting. After each phase some open-end questions were asked from the team members, but the meeting targeted for open discussion and commenting rather than having a strict interview-like agenda. All the comments were collected to field notes. The comments concerning each sales process phase and especially concerning the new sales tools proposed are analysed below.

Phase 1, first meeting. The comments about the first phase were mainly about the documentation tool. The idea of having a single template for documentation penetrating the whole process was considered as a positive idea. The group emphasized the instructions of how to use the documentation adding that company needs a solid policy of how to utilize the documentation. Second, the group highlighted the importance of arranging a second meeting with the prospect. The steering group stated that it ought to be mentioned as one of the nontechnology tools in the process. The idea was based on the assumption that oftentimes the second meeting leads to closing the deal more often than the first one. Other features mentioned were the goals for first meeting, the group unanimously voted for adding a box for the goals of each section which should be placed under the phase.

Phase 2, first offer. The new proposed tool in Phase 2 utilized the product catalogue. The steering group supported the new sales tool proposed and agreed about the importance of having a visual and practical product catalogue. Nevertheless, team added that as such the catalogue is not valuable for the prospect if the products and services are not explained more closely. Therefore, the absolute value is not the tool itself but rather the purpose which it is used for.

The steering group also discussed about the argumentation concerning the sales functions and came into a conclusion that each case is different and the value creation consist of different factors every time. Therefore, building the argumentation is necessary in each case and ought to be reminded for the sales team. The final comment which was agreed by the whole team was establishing a database for old offers. This was based on the fact that often the offer needs to ready and sent to prospect in short period of time. Having a database for offers could cut the time for building the offer and getting it to the prospect.

Phase 3, mapping. Debate about Phase 3 concerned mainly the placement of the phase. Part of the group mentioned that mapping ought to be placed after decision rather than before detailed offer. Additionally, the group did not agree about the development of Phase 3 when it came to replacing the phase. The discussion added some ideas concerning the mapping process itself, for example, stating that sales person ought to be involved in the mapping functions. This should add commercial perspective to the process supporting the following phases when discussing the arguments with the prospect. The steering group added that utilizing the value of mapping documentation would support the argumentation.

Phase 4, detailed offer. Discussion about Phase 4 in the developed sales process focused on integration with previous phase, thus utilizing the mapping documentation as a base of the detailed offer. And even though the system specialist is responsible for the mapping project, the sales person should be involved adding the commercial perspective to the process. This supports linking the gaps in the current IT infrastructure of the prospect's site to the detailed offer which directly aims for filling those gaps with products or services of the case company. The sales team also highlighted the importance of offering the simple and easy-to-buy offers. Some people pointed to that the current contract template is too complex for the prospect to understand.

Phase 5, decision. Phase 5 consisted mostly on decision making. The steering group ideas focused on how to ease to decision making function. The key theme was explaining the offer in detail to the buyer, answering questions and handling objections if necessary. The group agreed that solution for handling objection cannot be a specific tool but rather it ought to be combination of the tools from the previous phases. Taking into consideration that logic of selling remains the same throughout the process when it comes to single case. A more general point in the discussion was the fact that all function in Phase 5 should lead the prospect to close the deal.

Phase 6, internal start. As this phase follows closing the deal, it includes more administrative functions which cannot be avoided. Therefore, in the discussion there were no ideas of how to improve actions involved. It was considered as a phase that ought to be executed precisely paying attention to the quality of information entered to the different systems and passed to people involved to ease the following steps.

Phase 7, service or project launch. As well as in the previous phase, this stage does not have many functions for sales team. The steering group emphasized the importance of being present in collaboration with customer offering support if needed. In addition, the sales person responsible should be updated constantly of how the project is evolving. Another key function at this stage is billing, some of the group members felt that sales person in responsible ought to check the first bills making sure that prices match the original offer.

Phase 8, stabilize. Debate about Phase 8 concerned mainly ensuring the customer satisfaction. Especially after finishing a project or service launch, the sales person ought to actively communicate with the customer. The steering group agreed that having a proper documentation about the whole sales process with the customer would increase the quality of communication also functioning as a database for meeting memos and other relevant documents.

Summing up, this subsection presented the ideas from the steering group of the case company. The ideas were collected and documented in the discussion with steering group held in the site of the case company. Next subsection fine-tunes the toolkit of the sales process based on relevant comments given in the steering group meeting.

7.2 Fine-tuning the Toolkit for Supporting the Sales Process

This subsection analyzes the ideas given in the steering group meeting by the sales team of the case company. The ideas are presented and if relevant formed into separate tools to be integrated to the final proposal.

The first widely supported theme was adding the goals of each phase into the new process model. In the steering group this idea emerged several times and it was introduced by different people. The idea was based on the assumption that, if the process model is implemented, it should offer guidelines for the sales people on what to aim at each phase. Having a visibility at what the sales person should aim would function also as a reminder of how to proceed in each phase. These goals would offer an answer on why use the tools and what is the purpose of the tools in each separate stage.

When it comes to actual tools, Table 13 below summarizes the relevant ideas and presents the purpose of the tools also pointing to which phase those should be added.

New tool	Phase number	Purpose of the tool
Schedule the second meeting	1	Remind the sales person in responsible of scheduling the next meeting with the prospect. This ought be done onsite during the first meeting. Not letting the process fall into a stage where prospect does not know what will happen next and by whom.
Offer database for old offers	2	Collecting the previous offers into offer database and archiving those properly so those are easy find if needed. This would speed up the first offer when having a suitable template ready only price updating is necessary.
Building the arguments	2	Building the argumentation consists of all the relevant factors concerning individual sales process such as gaps in the prospect's system and offerings from the case company in order to fill the gaps.
Mapping project onsite	3	Tool itself was mentioned in the first proposal but adding the sales person to the function instead of being executed only by the system specialist would add the commercial perspective to the mapping process.
Preparing the contract	4	Offering a simple and easy-to-buy offers and contracts instead of complex and ambiguous ones.
Contract / final offer	5	Explaining the offer in detail to the buyer, answering questions and handling objections if necessary.

Table 13. New sales tools for the sales process.

The tools, presented in Table 13 above, are based on the ideas of the steering group of the case company. Taking into consideration the experience and know-how of the team, these tools can be imported to final proposition. Altogether, in the big picture, these additional tools supports the logic and ideas of the initial proposal. Additional tools strengthen the initial proposal adding the sales force perspective to the process model.

The following section adds the identified additional tools to the initial proposal forming the final version of the toolkit.

7.3 Proposing the Final Version of Toolkit for Supporting the Sales Process

The final version of the toolkit for supporting the sales process of the case company suggested in Table 14 below. It is based on the initial proposal presented in Section 6.9 and its validation in Section 7 and its subsections.

The outcome is a new toolkit to be added to the current sales process in order to support the sales process. The final proposal for the toolkit is shown in Table 14 below.

	PHASE number	Phase 1.	Phase 2.	Phase 3.	Phase 4.	Phase 5.	Phase 6.	Phase 7.	Phase 8.
TOOL TYPE	PHASE	First meeting	First offer	Mapping	Detailed offer	Decision	Internal start	Service/Project launch	Stabilize
TECHNOLOGY-AIDED	TOOL 1	**Company presentation** including service model and customer testimonials	**CRM** opportunity in CRM and information in CRM	**Mapping documentation and reporting**	**Preparing the contract** with CRM – attention to the structure of final offer / contract	**Prospect documentation**	**Adding the customer to the company systems** Financial management software, Helpdesk ERP and Document management software	**Communication with the customer**	**Customer satisfaction surveys**
	TOOL 2	**Prospect background** Asiakastieto, Internet, CRM, partners, customers	**Prospect documentation**	**Prospect documentation**	**Phone calls and emails** after meeting	**Arguments** Product catalogue, Service model, Customer testimonials	**Internal informartion** (email and annoncement in monthly meeting)	**Billing**	**Prospect documentation**
	TOOL 3	**Prospect documentation**	**Offer Database** for old offers		**Prospect documentation**		**Point the account managers**	**Project plan (Excel)**	
	TOOL 4				**Product catalogue**		**Prospect documentation**	**Prospect documentation**	
NON-TECHNOLOGY	TOOL 1	**Confluence** with the prospect	**Partner assistance** (wholesale, Microsoft etc.)	**Mapping project onsite** (System specialist + sales person)	**Meeting** with the prospect	**Contract / final offer**	**Meet the service manager**	**Following the company project process**	**Ending the project**
	TOOL 2	**Product catalogue** for the prospect	**Offering the detailed mapping project**	**Customer meeting**, going through the report	**Pricing** calculating differences, special pricing	**Communication** with the prospect		**Meetings regularly with the customer**	**Plan regular onsite support check**
	TOOL 3	**Business-like behaviour**	**First offer** using product catalogue		**Arguments / handling objections**	**Close** the deal		**Meeting with the service manager, sales and system specialist**	**ICT meetings and reporting**
	TOOL 4	**Schedule** the second meeting	**Building the arguments** for each case		**Meeting** with the prospect			**Following the company project process**	
GOALS FOR EACH PHASE		- Arrange the second meeting - Close the deal if possible	- Building the argumentations - Utilize previous offers - Aim for apping project	- Utilize the shock value of the mapping document - Use sales person in mapping	- Simplified and easy-to-buy offer - Utilize arguments from previous stages	- Explain the offer in detail - Close the deal if not suggest optional steps	- Pay attention to the input data when adding customer information to the system	- Check billing - Control the project	- Remember contacting the customer and regular meetings

Table 14. The final proposal of the toolkit.

The final proposal, presented in Table 14 above utilizes the input given by the steering group in order to ensure the validation. The tools marked with yellow colour represent the ideas from the sales team of the case company. Altogether, these additional tools support the logic presented in the initial proposal but as such they increase the effectiveness of the toolkit by sharpening the most important actions in the process. In addition, the goals of each phase are added to the final process model. This idea was introduced in the steering group meeting by all the participants. It enables the new process model to be used for offering guidelines for the sales people on where to aim at each phase. Having a visibility on where the sales person should aim would also function also as a reminder of how to proceed in each phase in order to successfully reach the goals.

7.4 Summary of the Validation

As a summary, this section presented the final proposal of the toolkit for supporting the sales process of the case company. In order to achieve the target, the study first presented the ideas which emerged in the steering group meeting held with the sales representatives of the case company. After discussing the ideas, they were formed into separate tools to be integrated to the final proposal. Finally, the additional tools were integrated with the initial proposal in order to present the complete final proposal which was shown in Table 14.

8 Discussions and Conclusions

This section discusses and summarises the results of the study executed in order to improve the sales process of the case company.

8.1 Summary

The business problem of this study was the lack of effective practical sales tools to support the current sales process in the case company. The objective of this study was to improve the sales process of the case company by selecting and adding these tools to the sales process. In order to achieve this objective, the study explored and analysed the current sales tools utilized in the case company, mapped the current sales process and identified the important process gaps. Based on that, the study, suggested a new improved sales process and a toolkit that could bring the sales process to the next level.

The original idea for the thesis came from the sales team of the case company. The sales team had a doubt that they do not have all the necessary sales tools included in their selling process. They also worried that this might cause the company unnecessary defeats in their sales interactions. In addition, some of the sales persons had already implemented their own sales to support their individual performance. This was seen as a threat since there were no solid guidelines which would have been followed by the rest of the sales team.

After identifying the research problem, which was formulated as the lack of the practical sales tools, this study defined the objective and intended outcomes for the thesis. The objective was to improve the sales process by improving the current sales tools in the sales process and suggesting the new effective sales tools. The outcome was defined as a toolkit for improving the sales process and offering steps for its implementation.

The research approach chosen in this thesis was action research. It was chosen since action research is considered as an approach for solving practical issues by utilizing collaboration between the company and the researcher (Coughlan et al. 2002). In this study, the researcher was part of the sales team participating in active collaboration and evaluation of the proposed sales tools. At the same time, the case company was able to benefit by closely following, interrupting and learning from the process.

This study drew from three main data sources which were the internal and external interviews, and internal company documentation. The interviews were utilized in the current state analysis and for building the first version. The company internal material was used for the current state analysis. The final proposal was based on the validation session. The key input in data collection was the interviews with the relevant stakeholders who were involved in the sales process.

The case company had a leading role in this study and showed commitment and willingness to actively contribute to the results. In addition to the interviews and discussions, the findings from best practice in sales were collected from relevant literature. In order to develop a credible proposal, business literature was examined to find the key ideas for developing the sales process and business-to-business sales tools, with only the most established and reliable sources selected.

Simultaneously with the data collection, a comprehensive current state analysis was executed. It was based on the discussions and interviews with the sales team and key customers. At that stage, the current process model was scrutinized and the current sales tools identified. At the same time the gaps in the process were identified. After the current state analysis, the study utilized the finding from the literature and added new tools to improved sales process, also explaining why and how those new tools ought to function.

The initial proposal was discussed with the sales team and further developed. The sales force of the case company actively commented on how to make the proposal even better. The new developed model received considerable support from the sales team, and based on the comments, some changes were executed before presenting the final version.

As a result the company got a new ready-to-implement sales process model including a toolkit consisting of new effective sales tools to support the sales functions. Reflecting on the fact that the new sales tools were developed with collaboration with the key players of the company the implementation process is rather simple.

In the end the research project was able to provide the answer for original research question by offering a new developed sales process model including new business-to-business sales tools. Also presenting how to utilize the sales tools and what are the benefits from using them.

8.2 Next Steps

In order to put the proposed sales toolkit into implementation, the case company could consider the following 8 steps proposed by Burlton (2001) for implementing new a process. These steps are presented in Table 15 below. In addition, the relevant tasks for each phase are proposed for the case company in order to succeed in the implementation.

Step number	Steps by Burlton (2001)	Tasks in the company
1	**Prepare for business testing.**	Translating the final proposal of the toolkit into Finnish. Polishing appearance and Finnish terms if necessary. Point out the sales person responsible of pilot project and potential prospect for piloting. Plan how to measure results and how to collect points to improve. Communicate actively with sales team, raise awareness.
2	**Complete business tests and pilots.**	Complete the piloting utilizing the new developed process model. Listen to the prospect and collect points of further development. Measure and analyse the results with sales team. Make notes and store them.
3	**Update deliverables.**	After analysing positive and negative points improve the toolkit phase by phase. Add or remove things that does not work properly. Utilize the whole team when updating the toolkit.
4	**Educate management.**	Involve the company management. Point out the results from piloting and present how new system improves sales functions. Debate openly and give management opportunity to influence if necessary.
5	**Develop rollout plans.**	Discover and indicate what is needed, who needs to be involved, what kind of practical changes are necessary and who is responsible. Emphasize broad participation for lowering the barriers for future changes. Plan how to train the staff properly.
6	**Train staff.**	Proper education and training is necessary to successfully implement the new system. Reserve time and space for training. Invite relevant people to training. Prepare material and presentations. Give enough time for comments and feedback.
7	**Develop and run marketing programs**	Integrate website marketing to new toolkit highlighting the same issues. Prepare new material using the same logic. Add relevant themes to everyday sales speech. Introduce new themes to customers and prospects.
8	**Roll out changes.**	Publishing the new process model in kick-off meeting with sales team. Motivate the team to utilize new toolkit. Act according to new themes. Measure performance and constantly evaluate. Develop plan if necessary.

Table 15. Action plan for implementing the new toolkit.

Table 15 above presents the action plan for implementing the new sales toolkit. The key points for successful implementation are, first, creating a plan. Implementation needs to be systematic and proceeding step by step. The other key elements are wide participation and active communication with the stakeholders increasing the level of enthusiasm and lowering the barriers for objections. Ideally, the case company management needs to run the project but still giving the sales force opportunity to debate about the changes along the implementation process.

8.3 Evaluation

This subsection evaluates the most significant features of the thesis which were data collection, company collaboration and the report itself.

First, the study has succeeded in researching the phenomenon of the sales process and business-to-business sales tools. The study focused on the areas which were directly related to the original issue, while irrelevant themes were scoped out of the project. The data collection in the thesis was done with all possible rigour. As the amount of time and resources were quite limited, the study concentrated on the data sources which were reliable and known in the business area studied. The amount of data could have been even more extensive to increase the level of validity but selecting the most significant sources should have tackled this issue.

Second, collaboration with the case company could also be considered as successful. The company members actively participated in the research projects offering their know-how and critical opinions how to develop the final proposal. Data was collected from both the interviews and also open discussions which were executed and documented rigorously. Once again if the research process had been rebuilt, the level of collaboration could have been even higher. As the case company is a small-sized company, all the key stakeholders were available and involved.

Third, the report itself can be considered as a good aid for the case company to reflect and continue with improvements to the existing sales process which would meet the needs of the case company. The report explained every phase of the research process as clearly as possible at the same time keeping it easy to read and understandable. Looking back to the writing process, the report could have been structured better so that it could be easier to see how the different sections are integrated into the overall approach. In addition, the level of commerciality could be higher in the way that some subsections could have explained the business context on more general level. This would make the report easier to follow for someone outside the company.

8.3.1 Outcome versus Target

The proposal which comprises the results of this study meets the target originally set for the Thesis, namely offering a new developed sales process model including new business-to-business sales tools. In addition, it offers the answer matching the research question as it was defined for the project. Therefore, the proposal can be evaluated as relevant. The proposal also combines the anticipated elements, both from the current system and for the proposed new process, so that it can also be considered comprehensive. The targets are reached for both filling in the gaps and improving the current sales process and for the development of the new sales tools. The suggestions are based on the interviews involving the case company and on the finding from the best practice from literature. Building the proposal followed a systematic logic and utilized the research problem and objective as guidelines. In addition, a research design was created and argued for to make sure that the outcomes of the proposal were developed systematically. Finally, the study suggested further steps for implementation to guide the company to actually benefit from the proposal.

8.3.2 Validity and Reliability

The reliability and validity of the thesis was ensured by following validity and reliability plan presented in Section 2.3. Reliability and validity was executed in order to ensure the quality of the research. In other words, it the reader can rely that the information in the research report is trustworthy.

In this thesis, the *validity* was ensured by utilizing data which was directly attached to the research problem. The data was collected from sources which were directly linked to the issues studied and had the necessary amount of experience and know-how from the business. The interviewed people were aware of the issues and have been working with them for a long time which ensured the sufficient level of understanding about the issues involved. The fundamental scrutiny of validity, as suggested by Quinton and Smallbone (2006), lies in comparing the findings against the original research question. In this thesis, the end-results indicate that the starting situation can be improved by implementing the suggested changes.

In this thesis, the *reliability* was ensured by utilizing various relevant data sources and using information which was up-to-date and executed by reliable researchers. It was also executed by applying established theories which are proven to be functional. In qualitative research when people are involved, the tools for evaluating the reliability ensure that the findings are based on relevant evidence. In this thesis, the end-results are based on best practice from relevant literature. The topics studied are recognized in the business and widely utilized. Therefore, it can be stated that results draw from the existing best practice rather than based on the opinions of the interviewed people or the researcher.

At the end, looking from a mountain top, as the competition in IT sector is fierce, companies ought to pay more attention to how to differ from the masses. Thus, image and brand management are important factors, and companies ought to keep in mind that people and their behaviour is the feature that is seen and felt by the customers. Therefore, it matters how people, especially the sales people, act and behave in the business field and deliver the message that the company wants to send.

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Questions for Internal and External Interviews

1.	What is the current process like?
2.	What kind of sales tools do you use in each phase?
3.	What are plusses and minuses of the current process?
4.	What are the most important things in the process?
5.	What should be changed?
6.	Other remarks about the current way of selling?

Interview questions for sales team interviews.

1.	What are the key elements in successful sales process?
2.	What are the key phases in the sales process?
3.	What are the key tools in sales phases?
4.	What is positive in case company's sales process?
5.	What are the weaknesses in the case company's sales process?
6.	What would you personally change in the case company sales process?

Interview questions for expert interview.

1.	Do you have a process for buying and what are key points in it?
2.	What are the main reasons for selecting a partner in your business?
3.	What are the key elements of successful sales process?
4.	How is the case company's sales process seen in your company and what are the top qualities?
5.	Last acquisition experience with the case company, what went well?
6.	How would you change the case company's sales process after seeing it on paper?

Interview questions for key customer interviews.

The List of Sales Activities discovered by Moncrief (1986)

1. Make sales presentations	42. Examine prior to installation	83. Determine legalities
2. Prepare sales presentation	43. Practice using product	84. Make guest speeches
3. Overcome objections	44. Take clients on site	85. Provide seminars
4. Call on potential accounts	45. Provide feedback	86. Call on existing accounts
5. IO potential decision making	46. Check in with supervisor	87. Entertain clients
6. Plan selling activities	47. Feedback from clients	88. Take clients to dinner
7. Leads for prospects	48. Fill out expense accounts	89. Take clients out to drink
8. Call on new accounts	49. Reports on sales activities	90. Throw parties for client
9. Make closure and obtain order	50. Read company literature	91. Take client to lunch
10. Products to take on call	51. Read trade publications	92. Flatter clients
11. Presentation "aid"	52. Phone office	93. Politicking outside
12. Introduce new products	53. Provide technical information	94. Send Christmas cards
13. Coordination with existing line	54. Coordinate activities	95. Spend night on road
14. Plan daily routine	55. Monitor competitor's products	96. Travel out of town
15. Study client's needs	56. Provide info to salespeople	97. Work after hours
16. Help clients plan	57. Assist management surveys	98. Work out of home
17. Demonstrate the product	58. Travel with supervisors	99. Travel in town
18. Predict closure dates	59. Take inventory for client	100. Travel to office
19. Prepare visual displays	60. Point of purchase	101. Attend local sales meeting
20. Expedite orders	61. Stock shelves with product	102. Sell to distributors
21. Handle back orders	62. Handle local advertising	103. Good relations with dist.
22. Handle shipment problems	63. Fill out purchase orders	104. Handle credit
23. Find lost orders	64. File	105. Collect past due accounts
24. Follow up client's order	65. Determine price by contact	106. Fill out credit forms
25. Tailor to customer needs	66. Submit price bids	107. Do public relations work
26. Write up orders	67. Sell to ultimate consumer	108. Order samples
27. Keep track of invoices	68. Attend sales conference	109. Load product
28. Give orders to support people	69. Attend regional sales meeting	110. Forecast demand
29. Modify product	70. Attend periodic training	111. Phone for service
30. Figure up bills	71. Work client conferences	112. Help find financing
31. Verify commissions	72. Fill out questionnaires	113. Politicking within company
32. Present during repairs	73. Set up exhibition	114. Phone to follow up
33. Test product*	74. Review new company products	115. Phone to set up appointments
34. Supervise installation*	75. Appointments by mail	116. Look up price
35. Perform maintenance	76. Look for new sales reps*	117. Distribute flyers
36. Make deliveries	77. Train new salespeople*	118. Make probing phone calls
37. Teach safety instructions	78. Travel with trainees*	119. Keep office in order
38. Train customers to use product	79. Design sales plan	120. Research clients' background
39. Order accessories*	80. Send out memos	121. Study market trends
40. Learn about product	81. Write letters	
41. Order repair parts	82. Determine own price	

* Activity did not show up in current study.

Sales Activities from 1986 Moncrief Study.