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Improvement Proposal for the Sales Account Management Process in the Case Company's Customer Service Team

Metropolia University of Applied Sciences

Master of Engineering

Industrial Management

Master's Thesis

June 1, 2022

Preface

The past year has been very challenging yet rewarding. I have had the pleasure to study in the Industrial Management program and use those newly learned skills in my work. It definitely was a right decision to apply to the program. I have learned a lot within a year.

I would like to take this opportunity to thank the case company for the opportunity to once again do a thesis, this time a master's thesis. Mrs. Kukka Vilkuna, thank you for your continuous support and guidance, I really appreciate it. I also want to thank all of my fellow workers who took part and contributed, together we can do it!

I want to thank Dr. James Collins for the guidance and for all the conversations that we had. I really enjoyed working with you. Thank you M.A Sonja Holappa for all the help with the professional language. I also want to thank Dr. Juha Haimala and Dr. Thomas Rohweder for your very interesting lectures. I learned a lot from you.

Finally, my special thanks go to my home team. I could not have done it without your strong support. You are the best!

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Kirkkonummi
June 1, 2022

Abstract

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Title:	Improvement Proposal for the Sales Account Management Process in the Case Company's Customer Service Team
Number of Pages:	60 pages
Date:	1 June 2022
Degree:	Master of Engineering
Degree Programme:	Industrial Management
Professional Major:	Service Management
Supervisors:	Dr. James Collins, Senior Lecturer M.A Sonja Holappa, Senior Lecturer

The objective of this study was to propose improvement proposal for the sales account management team in the case company's customer service team. The case company is investing heavily and there is a need to improve the sales account management process.

The research approach was design research using qualitative methods. The study was conducted in four stages. The first stage was the current state analysis to collect data and to find out the strengths and weaknesses in the process. The chosen weaknesses were used in the second stage, in the literature review. From the literature the best practices and existing knowledge were used to create the conceptual framework of the study. The third stage was the initial improvement proposal building stage. The initial improvement proposal was co-created with the relevant stakeholders. The fourth and final stage was the validation stage. The selected managers evaluated the initial improvement proposal and gave feedback. The initial improvement proposal was adjusted accordingly and formed the final improvement proposal.

In the current stage analysis a lot of weaknesses were discovered. The weaknesses were divided into six categories. For this thesis the two selected categories were customer account handling and roles and responsibilities. The rest of the categories were left out of this study. Estimation was that the greatest benefit would be achieved by tackling the weaknesses in the selected categories.

The outcome of this study was the improvement proposal for the sales account management process. The implementation of the final improvement proposal will benefit the company if implemented correctly and planned properly.

Keywords: customer account handling, RACI, mentoring

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CRM:	Customer Relationship Management
KAM:	Key Account Management
GAM:	Global Account Management
RFQ:	Request For Quotation
SOI:	Silicon-On-Insulator

1 Introduction

Managing customer relationships is a very demanding task. In order to be able to compete in the chosen market and bring value to the customer one must know the customers and their needs. Selling has turned from traditional selling to finding solutions to customers' problems. In sales the relationship building is in key role. In b-to-b sales relationships matter and customer experience has become more and more important.

For the case company in this thesis, Okmetic Oy, efficient sales is very important. The case company is looking to grow with the market and be the market leader in chosen niche areas and the best partner for its customers. The case company wants to create profitable, long-term relationships with its customers. Therefore a well-organized and capable sales team is an asset and must.

This study focuses on discovering improvement proposals for the case company's sales account management process in the case company's customer service team.

1.1 Business Context of the Case Company

The case company is the world's seventh largest silicon wafer manufacturer in the world with a revenue of 128 MEUR in 2021. It has about 590 employees. It supplies customized, high-quality, high-performance silicon wafers that are made in Vantaa, Finland and through contract manufacturing in Asia. The company has invested over 100 million euros in 2017-2021 in its Vantaa plant to increase the production capacity of SOI, high resistivity RFSi® and 200mm wafers. (The company website 2022)

The case company operates worldwide and has a sales network based in Finland, Germany, the United States, Japan and China and also sales agents in

Korea, Malaysia, Singapore and Taiwan. One of its core expertise is the management of customer relationships along with crystal growing, production of advanced specialty wafers and commercialization of product development projects. The company is looking for profitable growth and aims to keep its leading position in the market in advanced silicon wafers. (The company website 2022)

The case company aims to improve its sales account management process by shifting some of the workload from sales managers to the customer service team. It means that the customer service team will handle certain customers themselves along with their current tasks. This shift will give more time to the sales managers to hunt for potential new customers and new businesses and also take care of the big customers in deeper level. The change will take place in the sales team in Finland, in the United States and in Europe. Later on the change will be applied to the whole sales organization.

1.2 Business Challenge, Objective and Outcome

Currently the world is suffering from chip shortage. The demand for semiconductor and sensor chips is exceeding the supply and it is affecting both the consumer market and the industrial market. In the case company this high demand shows as fully booked product lines. The company has not been able to serve all of its customers. The company is looking to grow now and in the future so some adjustments need to be made in sales.

The case company aims to improve its sales account management process by shifting the workload from the sales managers to the customer service team. This will give more time to the sales managers to do the hunting, meaning hunt for potential new customers and new businesses and take care of the big customers in deeper level. The customer service team will handle certain customers themselves, which is called farming, in addition to their current other tasks. This change in mind the company has hired in 2022 two new sales coordinators and will hire two more later this year.

The objective of this study is to improve the sales account management process in the case company customer service team, and the outcome of this study is to propose improvements to the sales account management process in the case company's customer service team. The outcome should help the case company to manage the customer base more efficiently and give the sales managers more time to concentrate on deepening the relationships with big customers and hunt for new customers and new business potentials. The author of this study is a member of the customer service team.

1.3 Scope and Outline

The scope of this study is to find the weaknesses in the case company's sales process and to find solutions in order to improve the sales process as needed. This study does not include the implementation of chosen improvements.

This study includes seven sections. Section 1 is introduction to the thesis. In section 2 the project plan is explained in more detailed, including the research approach, research design and data plan. In section 3 the current state analysis is conducted and findings summarized. In section 4 the relevant literature is analysed and the conceptual framework outlined. Section 5 describes the initial improvement proposals for the improving the sales process in case company customer service team. Section 6 concentrates on validation and feedback from the initial recommendations and possible changes for final recommendations. Section 7 is for conclusions and self-evaluation of the study as well as recommendations for improvements.

The next section describes the project plan in more detail, including selected research approach, research design and data collection.

2 Project Plan

In the previous section the business challenge, objective and outcome were introduced. In this section the project plan is described by research approach and research design, and data plan introduced.

2.1 Research Approach

It is important to choose the most suitable research approach for the study in question. According to Saunders et al (2009) there are two approaches from which the selection is made. The first one is basic, fundamental or pure research and the second one is applied research. Basic research is used in universities and it is theoretical in nature and used for academic audience. The purpose of a basic research is to expand common knowledge of processes, and its findings have general value to society. Applied research on the other hand is conducted in many places, such as in organisations and universities. Applied research aims to new knowledge to a certain problem and its findings have practical relevance and value to the organization in question. Applied research results in a solution to the selected problem while basic research generates universal principles. Basic research has a more flexible timeframe compared to the tight timeframe of applied research. (Saunders et al., 2009: 8-9)

According to Kananen (2013) design research combines development and research, and produces functional and practical solutions to improve operations in organizations. In organizations there are continuous improvements ongoing. These continuous improvements can be compared to design research, although the scientific nature of design research comes from proper documentation, using appropriate scientific methods and producing reliable and new knowledge. (Kananen, 2013: 20-22)

Design research was selected as the research approach for this study and qualitative methods will be used for gathering the data. After consideration the design research was selected as the most proper approach, since there is a certain organizational business problem in the case company that needs improvements. The objective is to improve the specific process and as an outcome new knowledge for the case company is achieved.

2.2 Research Design

This study includes four stages that together form the process that aims to propose improvements to the business challenge. The research design is presented in Figure 1.

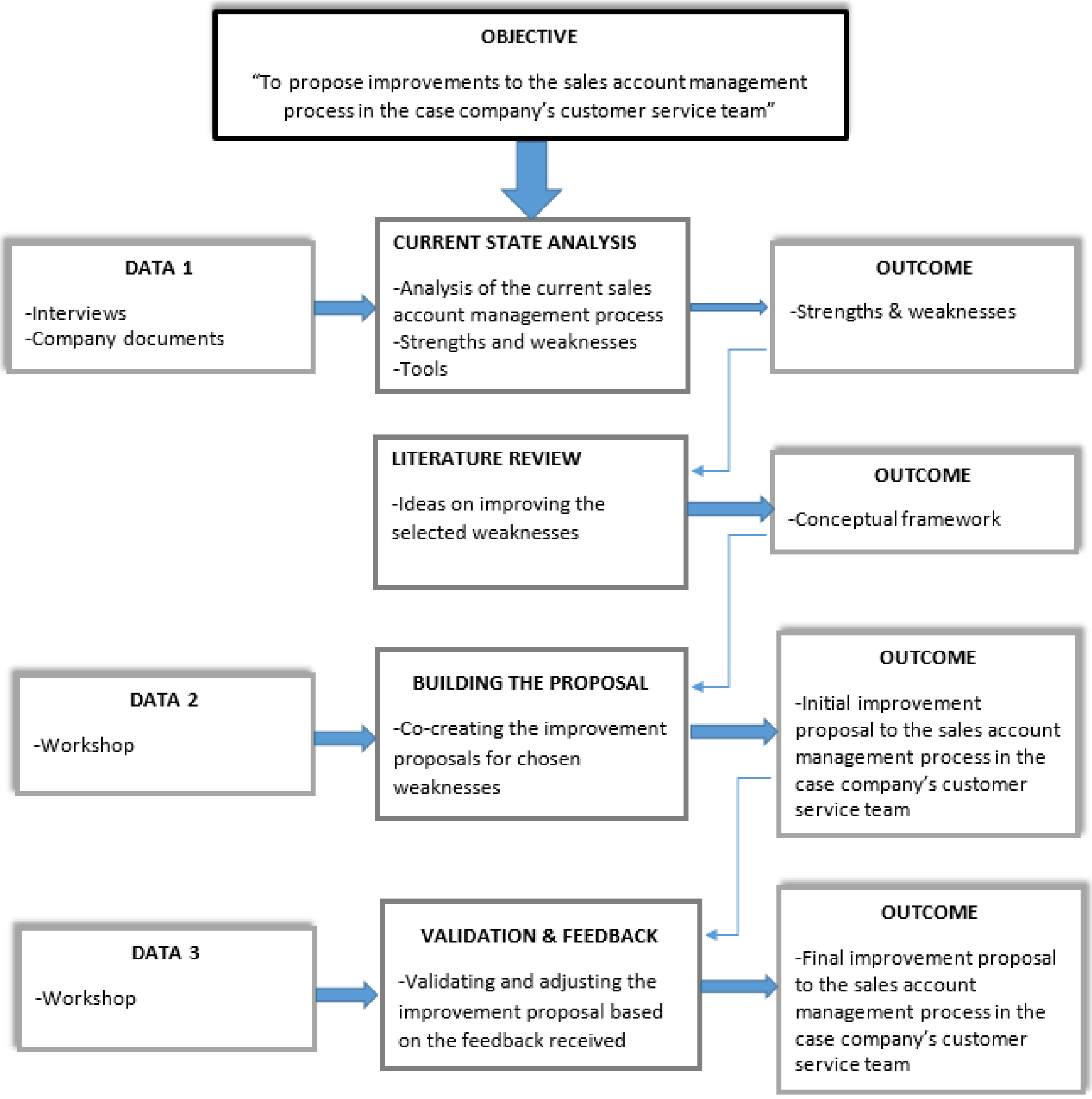

Figure 13.Research Design of this study.

As shown in Figure 1 the first stage is the current state analysis of the process. It is mandatory to understand the current state of the process in order to be able to improve it. The weaknesses and strengths need to be discovered.

The first stage, the current state analysis, was mapped out by interviewing the key persons and studying the internal documents about the process. The process was reviewed by the key persons from the daily work perspective and the weaknesses and strengths were discovered while the process was “walked through”. The results were documented as field notes and strengths and weaknesses listed and finally analyzed.

The second stage of the process was the literature review. Once the current state analysis was completed and knowledge from the weaknesses discovered, the literature review was to discover best practices and solutions to the problems in question. The key findings from the literature formed the conceptual framework of this study.

In the third stage the aim was to build the proposals in order to improve the current process. This proposal building took place during the case company’s sales meeting in May. The proposals were formed together with key stakeholders in multiple workshops. The proposals and comments were then combined and analyzed in order to form the outcome from the third stage as the initial recommendations for the process improvements.

In the fourth stage the feedback was collected and fine tuning made to the initial improvement proposals.

2.3 Data Collection Plan

This study drew its data from three rounds and from variable sources. In the first round the data was gathered mainly by interviews and from some internal documents. The internal documents were examined prior the interviews. The internal documents supported the process mapping. The interviews can be seen in Table 1. This data received from interviews was used for the current state analysis.

Table 9. Data 1 collection.

DATA 1 – CURRENT STATE ANALYSIS					
#	Source	Data Type	Topic	Date & Time	Documented
1	Sales Manager 1 (Europe)	Interview	Review of current process	Jan 12, 2022 8:45-10:15	Field Notes
2	Sales Managers 1 & 2 (USA)	Interview	Review of current process	Jan 12, 2022 18:30-19:45	Field Notes
3	Sales Coordinators 1 & 2	Interview	Review of current process	Jan 13, 2022 14:30—15:15	Field Notes
4	Sales Coordinators 3 & 4	Interview	Review of current process	Jan 17, 2022 13:00-14:30	Field Notes
5	Sales Manager 2 (Europe)	Interview	Review of current process	Jan 21, 2022 16:25-17:45	Field Notes
6	Sales Coordinators 5 & 6	Interview	Review of current process	Jan 24, 2022 13:00-14:10	Field Notes

As shown in Table 1, the data was gathered by interviewing the stakeholders that are involved daily basis with the sales account management process. Due to the COVID-19 pandemic the interviews were held by using Microsoft Teams. The notes were taken during the interviews and additionally the sales process was mapped out. It was important to have all the customer service team members interviewed to gain wider perspective to the process.

In the second data stage Data 2 was collected using workshops. In the second round the data was gathered to form the initial improvement proposals for the sales account management process. The workshops took place in the case company's May sales meeting in Vantaa. The participants were divided into six different groups and each group had from five to seven participants. Each group gave their own feedback and proposals. The following Table 2 presents the second round of the data gathering.

Table 10. Data 2 collection.

DATA 2 - INITIAL IMPROVEMENT PROPOSAL					
#	Source	Data Type	Topic	Date & Time	Documented
1	Sales Coordinator Export Coordinator Specification Engineers 1 & 2 Sales Manager Customer Support Manager 1 & 2	Workshop	Building the initial improvement proposal	May 11, 2022 13:00 – 15:00	Field Notes
2	Sales Coordinators 2 & 3 Specification Engineers 3 & 4 Vice President, Sales US Customer Support Engineer	Workshop	Building the initial improvement proposal	May 11, 2022 13:00 – 15:00	Field Notes
3	Sales Coordinators 5 & 6 Specification Engineer 5 Senior Sales Manager, Europe Customer Support Manager 3 Customer Support & Sales Manager	Workshop	Building the initial improvement proposal	May 11, 2022 13:00 – 15:00	Field Notes
4	Sales Coordinator 7 Manager, Specifications Customer Support Managers 4 & 5 Customer Service Manager Vice President, Sales Japan Vice President, Sales Europe	Workshop	Building the initial improvement proposal	May 11, 2022 13:00 – 15:00	Field Notes
5	Sales Coordinators 8 & 9 Specification Engineer 6 Product Manager Account Manager Sales Manager 2	Workshop	Building the initial improvement proposal	May 11, 2022 13:00 – 15:00	Field Notes
6	Sales Coordinator 10 Sales Director, China Field Application Manager Sales Manager 3 Technical Customer Support Manager Chief Commercial Officer	Workshop	Building the initial improvement proposal	May 11, 2022 13:00 – 15:00	Field Notes

As shown in Table 2 a lot of people from different departments were involved in the initial improvement proposal building. After the workshops the field notes were examined and the initial improvement proposal formed. A lot of material was produced in a rather short period.

Data 3 was formed from the feedback received from the Vice President of Europe Sales and from the Customer Service Manager. The purpose of this validation stage was to form the final improvement proposal according to the feedback received. The data collection is presented in Table 3.

Table 11. Data 3 collection.

DATA 3 - VALIDATION OF THE IMPROVEMENT PROPOSALS					
#	Source	Data Type	Topic	Date & Time	Documented
1	Vice President, Sales Europe Customer Service Manager	Interview	Validating the improvement proposals & feedback	May 25, 2022 13:00-14:30	Field Notes

Data 3 was the last collected data. As shown in Table 3 the data was collected in an interview and it was held by using Microsoft Teams. Data 3 was formed from the feedback received from the initial improvement proposals and it was collected in the form of field notes. The initial improvement proposal was adjusted according to the feedback received during validation.

The next section of this study presents the results from Data 1 collection and the current state analysis along with the strengths and weaknesses of the case company's sales account management process.

3 Current State Analysis of the Case Company's Sales Account Management Process

The research design and the data collection was introduced in the previous section. This section describes the current state of the sales account management process in the case company and analyses it. It describes how the current state analysis was conducted and identifies the strengths and weaknesses that were discovered during the analysis. Finally it summarizes the findings and introduces the key improvement areas.

3.1 Overview of the Current State Analysis

Data collection started by exploring the case company's process map. The existing process was described in upper level and it included the major process steps in case company's sales process. The process map also included the documents used in case company's sales process and the documents were examined next. The documents were used for building the process map from the sales process since they contained the work related information from each major process step.

After the starting material had been examined, the interviews started and building the more detailed process map of the sales process. The key persons that were interviewed were the ones that do the daily work and had the best knowledge for making the more detailed process map about the case company's sales process. By discussing and building the process map together the strengths and weaknesses were identified. The key persons that were interviewed were all the sales coordinators in Vantaa factory. Four sales managers were selected for workshops, two from Europe and two from the US. At this point the sales managers in Asia and Japan and sales coordinator in Japan were excluded. The reason for this was simply the different working culture that the Eastern region has.

After the interviews and process map building the strengths and weaknesses were categorized into themes. The weaknesses were examined and the final selection of the key themes conducted. This selection would be in the centre of the next stage of the thesis, building the Conceptual Framework from literature.

3.2 Description and Analysis of the Existing Process

The case company's sales process has seven main steps. The process starts from the demand creation and ends at the follow-up after the goods have been delivered to the customer. Figure 2 shows the main seven steps in the sales process. The process can be divided roughly into two parts according to the tasks that sales managers and sales coordinators do.

Figure 14. Case company's upper level sales account management process.

Sales managers are responsible for the first three steps of the process, starting from demand creation and ending at the quotation phase. In addition they are responsible for follow-up, after the goods have been delivered to the customer. Sales coordinators are responsible for customer order until delivery. In addition they do quotations, mainly to stock wafer requests. As seen in Figure 2, the main steps are quite clear, but there are some overlapping in the quotation phase when it comes to sales managers and sales coordinators' work.

3.2.1 Sales Process from Demand Creation until Follow-up of Order

The sales process starts from the demand creation as seen in Figure 3. The demand can be created in many ways. Usually the customer contacts the case company's sales representative and asks for a quotation. The customer might have some R&D activities ongoing and needs a quotation for new parts. Some connections are made during the technical roadshows. Marketing activities have created new contacts and new quotation requests. Customer visits are important and during the visits new opportunities are found and co-created. In addition sales managers are actively searching for new potential customers, which is quite time consuming.

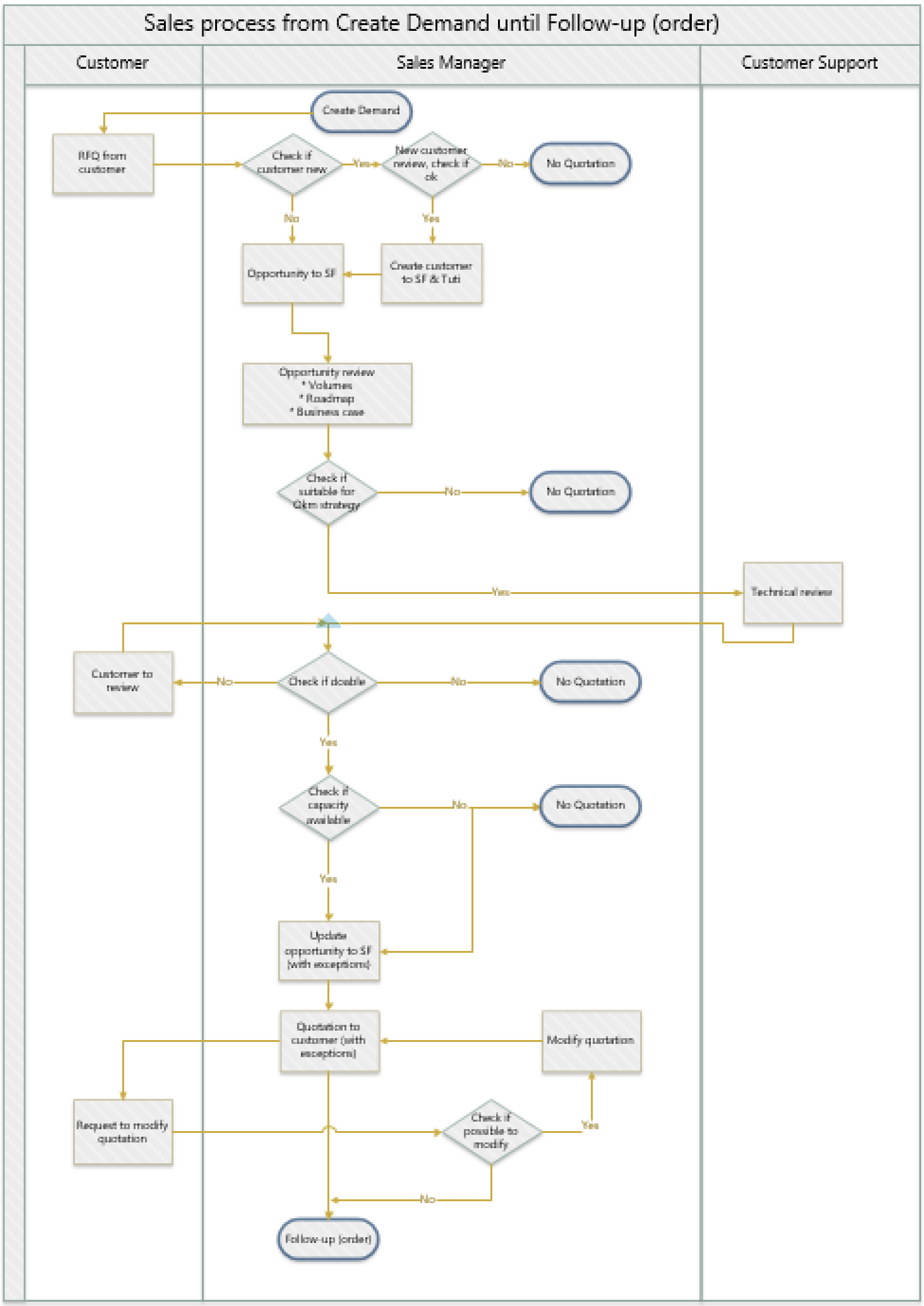

Figure 15. Sales process from Create Demand until Follow-up of order.

When the quotation request is received, it must be checked in many ways. First thing to check is if the customer is already existing or if it is new one. If the customer is new it has to go through the New Customer Check procedures. If the customer passes it, the customer is created to Tuti, which is case company's database, and an initial opportunity can be created to case company's CRM system. Next the potential volumes, roadmap and business case are evaluated. If all looks good, then next step is to check if the product is suitable to the case company's portfolio. If the product is suitable, then the technical review is done by customer support. Customer support gives feedback if the product is doable or if it needs to be modified. If it needs to be modified, then the comments are sent back to the customer to review the possible changes. The last thing to check is the available capacity. If any of these are not ok, then the quotation cannot be created or it can be created with exceptions. Figure 3 shows these different possibilities, when the quotation cannot be created.

If all is in order, then the earlier created opportunity is updated with all necessary information and the quotation can be created and sent to the customer. Sometimes the customer can ask for small changes to quotation. Those are reviewed and possibly modified and the updated quotation sent back to the customer. The responsible sales coordinator follows up if the order is placed and updates CRM system whether the case was won or lost and if lost, adds the reason for losing the case.

In these three steps of the main process the main difficulties were related to the quotation phase. All parties agreed that the pricing is one big problem and needs to be fixed. Currently there is no tool available that could be used for the pricing. Each sales manager does the pricing independently and using different methods. Some sales managers use old quotations for the pricing and others get help from the customer support. In addition the products are custom made, so that has an impact on the pricing. The pricing after all is a very important part of the quoting phase. There are already some actions taken towards solving the pricing issue.

There is also lack of knowledge in using the tools, especially CRM system, which is one of the main tools for sales managers. Not all opportunities are put into CRM system as they should. When it comes to the roles and responsibilities, it is not always clear, who takes care of and what in CRM system. Some actions are for the sales managers and some for the sales coordinators. Saletti, which is the case company's forecasting tool and one of the main tools for the sales managers, is in everyday use. Also Saletti is lacking the clear information of who is responsible for which action.

One problem that the case company currently has is the lack of capacity. The sales managers need to think carefully what to sell and to whom, since there is not enough capacity available for all. The quotations are send even though there might not be capacity available at the moment but it might become available later. Once the quotation has been send and an order comes, the order cannot be confirmed. It will be put on the waiting list until capacity is available.

Communication was one of the issues that were raised during the interviews. Communication inside the house is sometimes fast and sometimes takes time. The time difference between different continents is not helping especially towards US. Sometimes there are mixed signals due to the lack of capacity. First there is shortage of capacity and few days later it can be available. The sales managers find this hard to cope with. There can be multiple checking ongoing at the same time. Information flow is not always optimal and some answers might come later than anticipated.

In addition to the weaknesses the process has strengths. Overall the co-operation inside the house is very strong. When problems occur, help is always available. The sales managers were happy that they got needed answers fast inside the case company and could proceed with the quotation.

3.2.2 Sales Process from Customer Order until Delivery

The sales process from order until follow-up is shown in Figure 4. The process starts when the customer sends the order and ends in follow-up after the material has been delivered to the customer and is on the customer's production line.

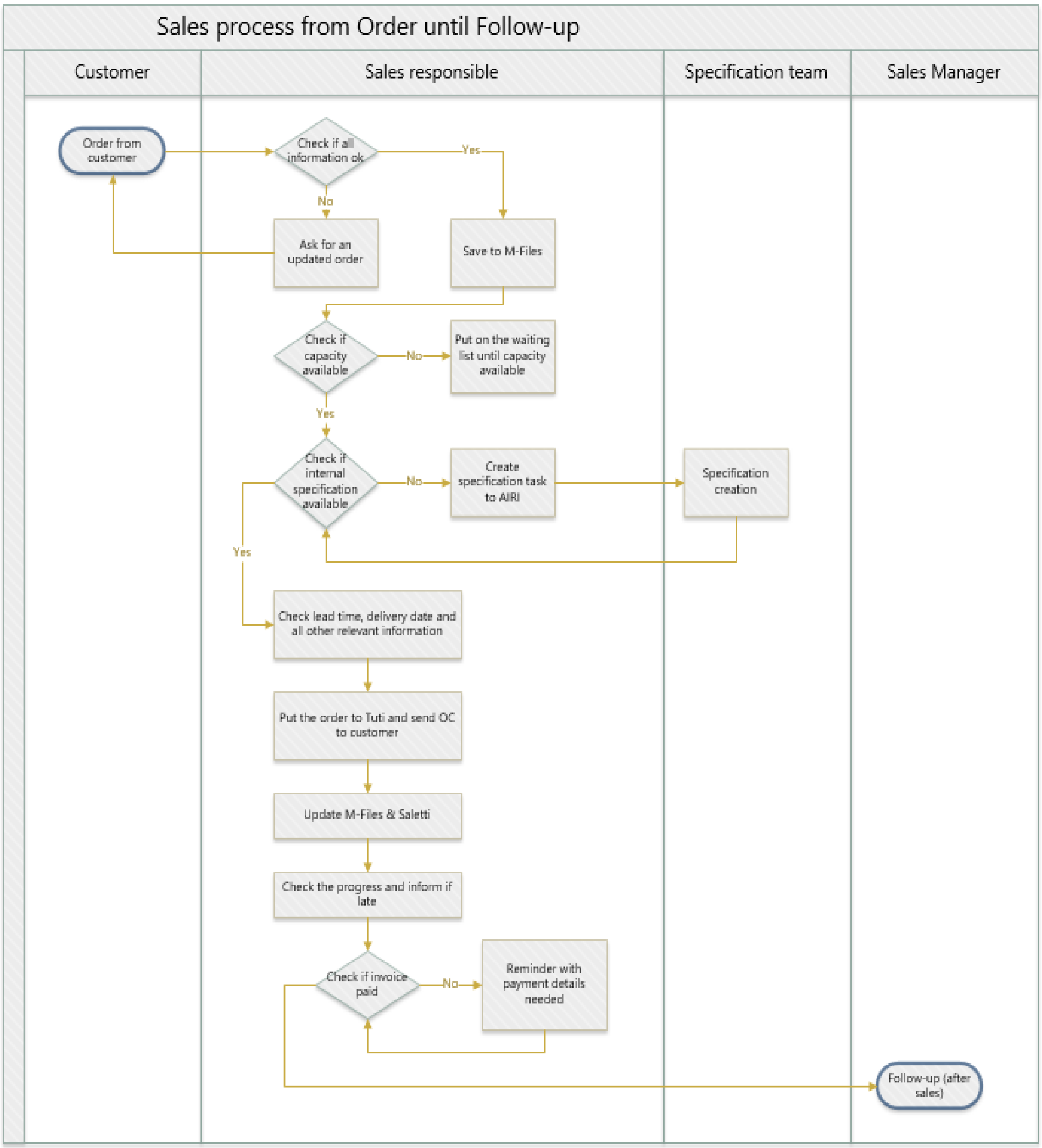

Figure 16. Sales process from Order until Follow-up.

While the sales managers took care of the sales process in the beginning, now the responsibility transfers to the sales coordinators. As seen in Figure 4, the process starts when the customer order is placed. Once the order is placed, it must be checked against the quotation. If they match and all other information is valid, the order is saved to M-Files, which is the case company’s document archive. If they do not match, the customer is asked to update the order. The next step is to check if the capacity is available. If the capacity is not available, the order is not confirmed and it goes to a waiting list until the capacity is available. The customer is notified about the situation. If there is capacity available, the specification is checked whether it is valid or not. If it is not valid, a specification task is created for the specification process.

The specification task needs several documents, including at least the quotation and the order. If the product is very complex, then there will be multiple additional documents that needs to be attached. Additionally if the product needs evaluation, the customer support needs to do the reviewing. Once the specification is ready, the order is put into Tuti and lead times, dates, amounts and all other information is checked. Once the order confirmation is ready and checked it can be sent to the customer. The sales coordinator then updates the Saletti and M-Files and also the CRM system, if needed.

The sales coordinator is responsible for monitoring that the order is coming on time from production. If not, early warnings need to be sent to the customers. This information should come from the production planners but quite often the sales coordinators need to do it themselves. When the customer receives an early warning, they can decide, if they want to receive a partial shipment or wait until the material is completely ready. The sales coordinator also takes care of the receivables if they are not paid on time. It is their task to send the reminders to the customers. The follow-up is the sales manager’s responsibility. Once the customer has received the material and the material is on their production line or in testing, the sales manager should enquire how the product is working and ask for potential future orders.

The process from the order phase until follow-up is quite clear. Even though it might look simple, it holds many steps where mistakes are possible. The sales coordinator must be very precise when checking the order against quotation, making the specification task with correct attachments attached and putting the order into Tuti. Much is relied on memory, which is not optimal nor beneficial. Fortunately the tools are preventing mistakes but not fully.

The same kind of problems occur all over the sales process from create demand until follow-up. Responsibilities are sometimes unclear and not as they were originally defined. Getting answers from inside the house can take much longer than anticipated. Additionally communication to the customer is not always clearly defined, what is allowed to say in certain occasions. This creates challenges to the sales coordinators. Fortunately the sales coordinators can rely on the support they get from colleagues and from other stakeholders.

3.2.3 Stock Sales

In stock sales cases the procedure visualized in Figure 5 is lighter compared to the traditional sales process visualized in Figure 3. In stock sales process the customer usually already exists. The main task is to check if the material is available, reserve the material and make the needed quotation in CRM system and send it to the customer.

If the request comes from a new customer, the customer goes through New Customer Check procedures and if all is in order, the opportunity and quotation are created in the CRM system. After that the quotation can be sent to the customer and continue with follow-up if the order is placed. If the customer does not pass the New Customer Check procedures, the process ends there and quotation cannot be created.

Even though the stock sales process seems to be straight forward as visualized in Figure 5, it has many variations. It is not always clear, who takes care of the request. If the customer exists, the responsible sales coordinator should take care of it. Due to the time difference this does not always apply to the US sales. In addition the request can come from a totally new customer and can have elements that require customer support's help. Then the first contact should be the customer support instead of the sales manager or the sales coordinator.

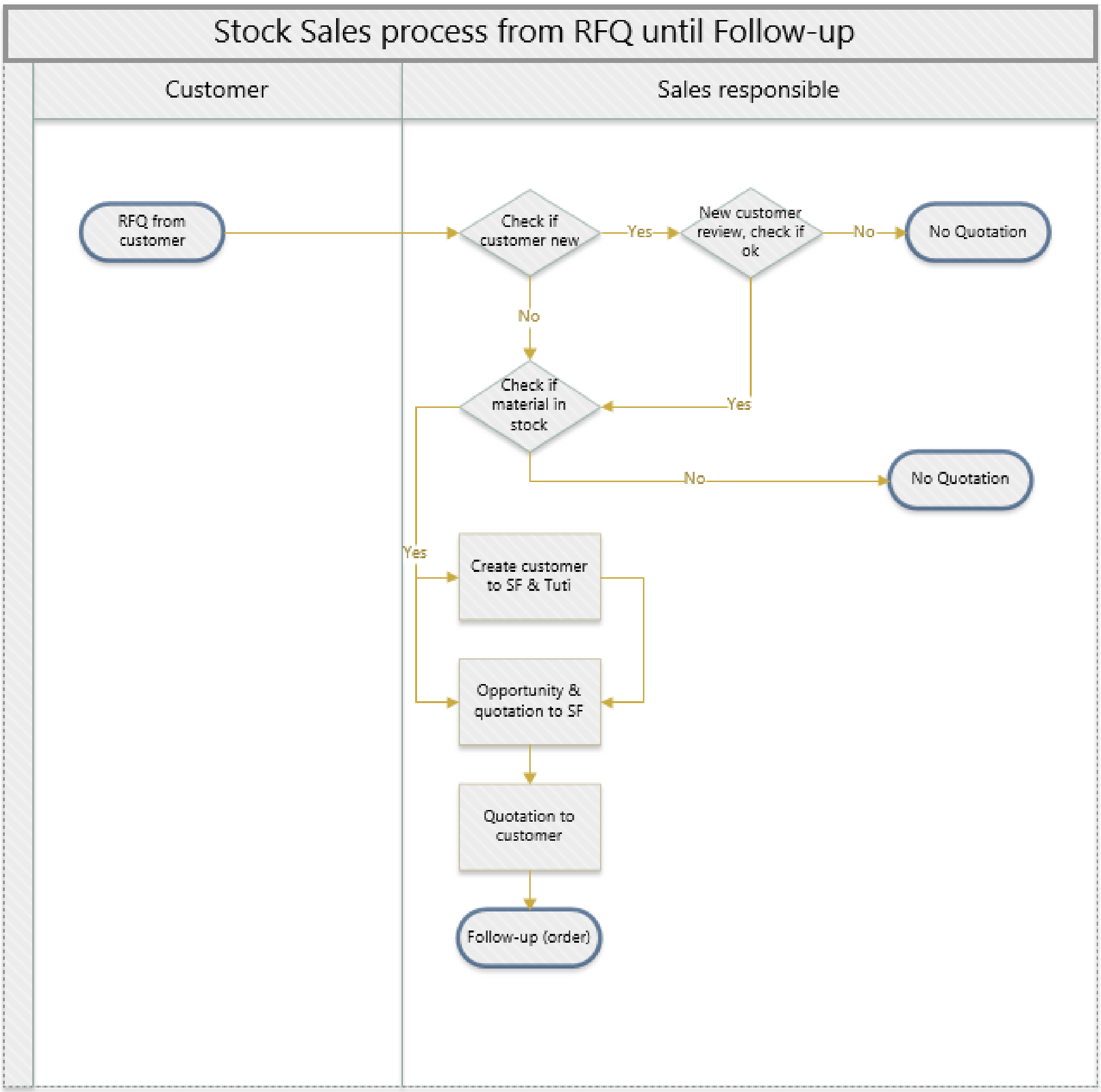

Figure 17. Stock sales process from RFQ until Follow-up of order.

The stock sales process shown in Figure 5 is a part of the sales process but its priority is not high. What is interesting is that there are the same kind of problems occurring as in the whole sales process. It strengthens the importance of roles and responsibilities and how they are defined in the sales process.

3.3 Strengths of Current Sales Account Management Process

During the workshops a few strengths were discovered and they are shown in Table 4. Overall the process was considered working properly without any major problems and was considered as a strength in the case company. This was the common message from all the stakeholders.

Table 12. Strengths of the Current Sales Account Management Process.

#	Strength	Category
1	Co-operation and support from other team members	Communication, Working method
2	Fast replies from people in Sales Process	Communication
3	Tools (CRM, Tuti) preventing mistakes	Tools

It was stated earlier that the case company has a high level co-operation between the stakeholders. If problems occur, help is always given without any hesitation. This is a true strength. The work atmosphere is encouraging. The collaboration between different departments works well.

The tools are considered both as strengths and weaknesses. Tuti, the case company's database is custom built with close interaction with the stakeholders and is very user friendly. It has a mistake preventing element integrated. On the other hand it needs updating and a project has been established to improve the system. The CRM system has been in use for about two years and the sales team is still learning new things from it. It is vital to have a working CRM system in place. Even though the list of strengths in Table 4 is short, they are important findings.

3.4 Weaknesses of Current Sales Account Management Process

The weaknesses discovered in the case company's sales account management process during the workshops are shown in Table 5.

Table 13. Weaknesses of the Current Sales Account Management Process.

#	Weakness	Category
4	Tools (CRM), not enough knowhow to use in full potential, not accessible to all, lacking data (not all information saved, if deleted, then no backup file)	Tool issue
5	Tools (Tuti) not flexible and lacking all kinds of helpful functions	Tool issue
7	Pricing not clear, since no pricing tool available	Tool issue
11	Lack of manufacturing capacity	Tool issue
17	Archives not supporting information gathering, data scattered in many places	Tool issue
25	Instructions not up to date in some parts	Tool issue
8	Lack of information about sales in deeper level (US East vs US West etc.)	Miscellaneous
29	Payments missing references	Miscellaneous
30	Customer specifications missing part numbers	Miscellaneous
13	Best practice sharing insufficient (Tuti and CRM)	Working method
14	Spec task from customer support missing links	Working method
16	Manual mistakes possible in many places (Saletti, Tuti)	Working method
21	Blanket PO's hard to manage	Working method
18	Too much rely on memory, since systems don't support everything	Working method, tool issue
28	Capacity driven sales, what kind of products can be offered	Communication, working method
23	Communication inside Sales teams sometimes problematic, no answers	Communication
27	How to communicate with other teams	Communication, working method
9	Time difference sometimes problematic while working in three continents	Customer relationship handling, communication, roles & responsibilities
12	Follow-up needs to be done manually and when it should be done (order phase and after delivery)	Working method, roles & responsibilities
19	Opportunities missing from CRM	Customer relationship handling, working method
22	Communication to customer sometimes problematic, what can be said in certain occasions, early warnings to whom	Customer relationship handling
6	Tools (Saletti) updating and instruction unclear from time to time	Roles & responsibilities
10	Information comes from multiple places inside the house	Roles & responsibilities
15	How to divide customers between sales managers and sales coordinators	Roles & responsibilities
24	Production follow-up left to sales coordinators instead of planners	Roles & responsibilities
26	Opportunity closing in CRM, who's responsible and what if partially won	Roles & responsibilities
20	Teams too mixed, need to be reorganized somehow	Roles & responsibilities
31	Small customers can be laborious compared to bigger ones	Roles & responsibilities, customer relationship handling, working method
32	Knowhow insufficient in general from sales coordinators about account handling, sales skills	Customer relationship handling and communication

As shown in table 5 the identified weaknesses were divided into several categories. Some of the weaknesses fit into multiple categories. Multiple tool issues occurred even though tools are also considered as strengths. A few weaknesses were customer related and were left out of this thesis. Working methods as a category had different kinds of weaknesses identified. At least one of them will be dealt outside the thesis.

The sales coordinators commented that they do not have enough knowledge to manage accounts with full potential and more training is needed. As back office workers they have been in contact with customers on a daily basis, but the goal is to expand current knowhow. Additionally they have taken part in training called “Skills to growth” in order to independently take care of the small customers already. Roles and the responsibilities that come within were identified to be somewhat unclear. This applies both to all sales persons and responsible persons in production.

3.5 Summary of Current Sales Account Management Process Strengths and Weaknesses

The current sales account management process was mapped out in multiple workshops and at the same time the strengths and weaknesses were discovered together with the stakeholders. All participants agreed that the case company’s strengths in the sales account management process are well working process with tools that prevent mistakes. Communication and co-operation between stakeholders are at a very good level.

Many weaknesses were found and they are shown in Table 5. The key weaknesses which were selected to be dealt with in this thesis are shown in Table 6. The weaknesses were divided into two main categories: customer relationship handling and roles and responsibilities. The aim of this thesis was to improve the current sales account management in the customer service team so that it would give the sales managers more time to take care of the bigger customers and hunt for new potential customers. The sales coordinators would take a part of the sales manager’s workload in addition to the current tasks they have. The selected key improvement areas described in Table 6 were the ones that could benefit the whole sales team the most.

Table 14. Key improvement areas to elaborate.

#	Weakness	Defined category
9	Time difference sometimes problematic while working in three continents	Customer relationship handling, communication, roles & responsibilities
12	Follow-up needs to be done manually and when it should be done (order phase and after delivery)	Working method, roles & responsibilities
19	Opportunities missing from CRM	Customer relationship handling, working method
22	Communication to customer sometimes problematic, what can be said in certain occasions, early warnings to whom	Customer relationship handling
6	Tools (Saletti) updating and instruction unclear from time to time	Roles & responsibilities
10	Information comes from multiple places inside the house	Roles & responsibilities
15	How to divide customers between sales managers and sales coordinators	Roles & responsibilities
20	Teams too mixed, need to be reorganized somehow	Roles & responsibilities
24	Production follow-up left to sales coordinators instead of planners	Roles & responsibilities
26	Opportunity closing in CRM, who's responsible and what if partially won	Roles & responsibilities
31	Small customers can be laborious compared to bigger ones	Roles & responsibilities, customer relationship handling, working method
32	Knowhow insufficient in general from sales coordinators about account handling, sales skills	Customer relationship handling and communication

Tool issues, problems in working methods and in communication were excluded from the scope. Tool issues needed IT department's help or were otherwise not relevant to this thesis. Problems in working methods and in communication will be handled later in case company's own projects and therefore those were left out from this study.

As shown in Table 6, the most relevant weakness categories to be tackled were customer relationship handling and roles and responsibilities. Especially customer relationship handling has a great significance when customer experience is in question. If the person that manages a certain customer account changes, the service must still stay on the same high level. Additionally roles and responsibilities must be defined properly. As a result, the process will become leaner and unnecessary work can be avoided.

This completes the current state analysis stage of this study. The following Section 4 focuses on the literature review and it will form the Conceptual Framework of this study. The focus is to search and find improvement ideas for the identified key weaknesses in Table 6 of the current sales account management process.

4 Improvement Ideas from Relevant Literature

This section researches relevant knowledge from literature and turns it into a conceptual framework of this study. The literature was selected based on the outcome of the current state analysis described in Section 3. The outcome was a summary of findings which were divided into two main categories. Based on to the categories the literature search was conducted in order to get ideas to improve the identified weaknesses.

This section describes the key findings from literature in two sub-sections. The last part of section 4 summarizes the most important knowledge as the Conceptual Framework.

4.1 Customer Relationship Handling

According to Peppers and Rogers (2017) a genuine business relationship have seven different characteristics. The relationship must be mutual where both the seller and the buyer participate. Then the relationship must be interactive. Both parties exchange information and build the relationship, which makes it iterative in nature. A genuine business relationship provides ongoing benefits to both the seller and the buyer company. In order to maintain the relationship it might require changes in behaviour. Each relationship is unique and requires different kind of attention from managing the relationship. Ultimately the relationship is built on trust (Peppers and Rogers, 2017, p. 46-48).

Relationship management affects customer experience. That is why it has to be taken seriously and requires effort. Peppers and Rogers (2017, p. 101) also state that reliability has three basic principles:

- Do things right by being competent. Attention should be put on customer experience.
- Do the right thing by ensuring that your organization has the best interest in mind when taking care of the customer and focus on long-term value.

- Be proactive and find best solutions for the customer.

It is important to know your customer and build a long and trustworthy relationship. Ellis (2011. p. 318) states that personal selling in business-to-business market has a significant role. The sellers quite often establish a personal relationship with the seller and can have access to confidential information which can benefit the seller company in many ways.

4.1.1 Customer Relationship Management (CRM) and CRM Tool

Werner Reinartz (2012, p. 5) defines CRM (customer relationship management) from the business strategy perspective. He says that the goal is to gain a long-term relationship that brings the competitive advantage. It optimally delivers value and satisfaction to the customer. At the same time it extracts business value to the seller company. CRM is a strategic choice and by choosing CRM a company can select the most profitable way of serving and shaping the interaction between the customers and the company. And it can be used to define the future value of the customers. CRM as a tool brings a lot of value to the company. But it must be in use. (Reinartz, 2012)

Baran, Galka and Strunk (2008, p.277-278) state that CRM must create value to salespeople by saving their time and effort, by making the salesperson more productive and by streamlining sales organization’s decision-making. Otherwise it is not working properly. A good CRM tool has advantages both for the salespeople and also for the management level. For example opportunities are made on real-time basis and management has access to those. CRM tool contains information stored by people that use it. If the usage and the quality of information is poor, then the CRM system does not work with full potential. According to Baran et al. (2008) the company culture and organizational commitment is in key role for successful CRM usage. (Baran et al., 2008)

CRM can be used for reorganization of the sales department. The customer base can be easily segmented. Since CRM has all the account history available, it is easy to a new sales person to start working with the existing customers. And the company can easily make reorganization to ensure the correct salespeople take care of the accounts in the best possible way. CRM enables optimal resource allocations. (Baran et al. 2008, p. 286-287)

According to Reinartz (2012, p. 5) companies are moving away from measuring market share. Instead they are measuring newer metrics such as customer lifetime value. Baran et al. (2008, p. 424) explain that Customer-Business Life Cycle can be divided in a number of stages such as acquisition, development, retention and win back. Reinartz (2012, p.340-342) links customer profitability to customer acquisition and relationship duration and this is shown in Figure 6. In an acquisition process a selling company needs prospects that turn into customers. In a retention process a selling company tries to maintain the customer relationship and gain profitability. It is important for a company to maintain the profitable relationship. If a customer decides to end the relationship, it will lead to a loss of revenue. Not only the current revenue is lost but there can be a loss of potential revenue too. The company must then find a replacement for the lost customer and for the lost revenue. If there is no replacement found in the existing customer base, then the acquisition process is used to find new companies to replace the lost revenue. (Reinartz, 2012; Baran et al., 2008)

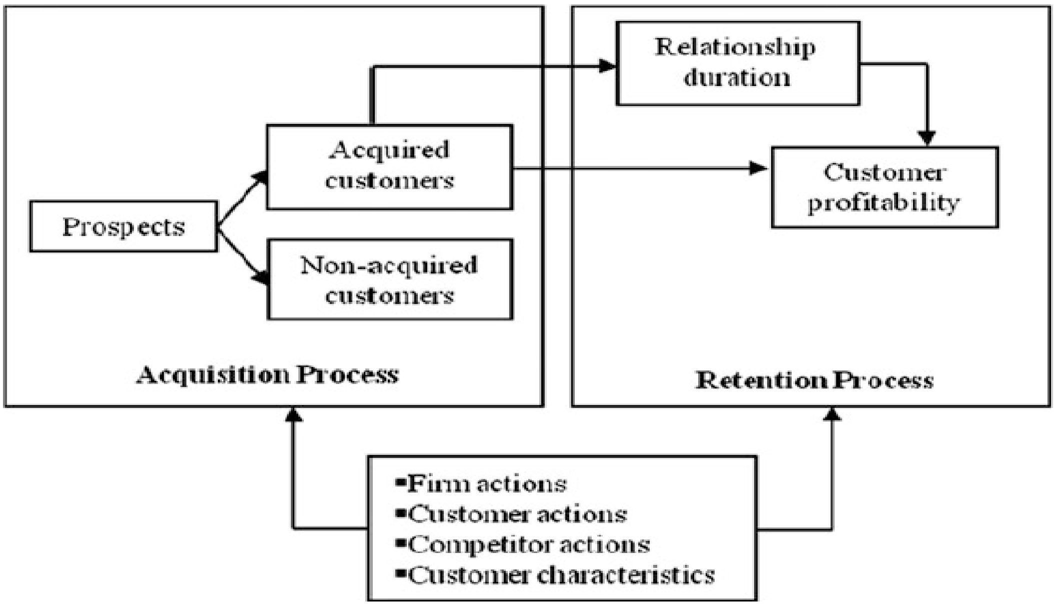

Figure 18. Linking customer acquisition and retention processes to customer profitability (Reinartz 2012, p.340).

Figure 6 shows the link between the acquisition and retention processes. The retention process is very important to companies. With good customer relationship handling and management a company can profit from the retention process significantly while putting the focus on its customers. The acquisition process on the other hand uses a lot of energy and time, since its mission is to find new customers to the retention process and build the relationships.

4.1.2 Using Key Account Management (KAM) in Customer Relationship Handling

Mäntyneva (2019, p.11) states that key account management is a systematic way of working and managing important customers. It effects the company’s customer base. Key account management leads to a smaller amount of key customers that brings the most of the revenue for the company. The goal is to establish a long and mutually beneficial relationship between the customer and supplier. (Mäntyneva, 2019)

For a profitable growth a company needs to grow its current customers’ purchases. Therefore Key Account Management has a significant role when new products are offered to current customers. It is expensive and time consuming to find new customers. Mäntyneva (2019, p.29)

The selection of key accounts consists of multiple elements. According to Reinartz (2012, p. 266-267) in deciding what companies should select as Key Accounts a company must use both quantitative and qualitative criteria. Sales volume, market share and profit are considered as quantitative criteria. Reinartz (2012) argues that 50-60 % of the sales should come from key accounts. Option is to select key accounts from the top 10 customers. Thirdly by Pareto the Key Accounts bring 80 % of the sales volume. For qualitative criteria Reinartz (2012) mentions for example reference potential, technology potential and know-how, inter-organizational and cultural fit and image. Both aspects and criteria must be taken into account when selecting key accounts for the company. McDonald and Woodburn (2011, p 31) warn that the number of key customers should be balanced so that the resources are adequate and the key customer gets enough attention. (Reinartz, 2012; McDonald & Woodburn, 2011)

According to Wengler (2006, p. 37) in business-to business markets the key account management team needs to have well-defined tasks and roles in addition to farsighted and excellent team management. Wengler (2006, p.39) also mentions that key account management should have cooperation with the research and development department and with production department when evaluating new products and offerings. This will lead to improved planning process and forecasting. Mäntyneva (2019, p. 31) agrees that the goal with key customers is continuity and predictability. (Wengler, 2006; Mäntyneva, 2019)

Regardless whether the customer is a key customer or not, relationship management is important. Customer experience has become more and more important. According to Mäntyneva (2019, p. 33) customer experience in business relationships can vary depending on the role that the person has in the company. While the buyer might be happy, the quality person might have a different experience about the product and therefore feel unhappy. Customer relationships also need predictability and continuity. If the relationship is strong, then forecasting becomes easier and more accurate (Mäntyneva, 2019. p. 31). In customer relationship management profitability comes important according to Mäntyneva (2019, p.35) If the relationship is not profitable, then some changes are needed. Building up customer relationships might lead to changes in customer category. Some key account might become regular customer and regular customer might become a key account. Therefore each account should be handled in the most professional way. (Mäntyneva, 2019)

4.1.3 Using Global Account Management (GAM) in Customer Relationship Handling

Global account management is used when companies operate worldwide in international business. Jobber et al. (2019, p. 246-247) explains that globalisation has made GAM very important for multinational organisations. GAM is basically the next step from key account management but there are differences that makes it more complex. For example cross-cultural issues must be taken into account since the teams work globally in different continents and communication takes place globally. Managing cross-cultural teams can be very demanding. And different locations have their own political and economic landscapes that have to be taken into account. A global account manager's role is therefore very demanding.

Hennessey and Jeannet (2003, p. 183) state that even though GAM strategy is global, the work is done on a local level. It means that strategy and relationship management take place locally. The global account strategy is implemented on a local basis. (Hennessey and Jeannet, 2003)

McDonald & Woodburn (2011, p. 374-375) argue that global accounts do not need to be key accounts. They can operate worldwide but they do not qualify as key accounts. Additionally a customer can be operating globally but decisions are made individually in each country they operate. Then the use of regional key account management should be applied. (McDonald & Woodburn, 2011)

4.1.4 Sales Skills and How to Improve Them

Sales skills is something that everybody can develop themselves. It requires internal motivation and courage to step out of one's comfort zone. The skills do not develop fast, instead they require time and patience. (Salminen 2018, p. 161)

Salminen (2018, p.161-162) has created a model that should help to develop sales skills. It is divided into five sections:

- The need to develop
- Awareness of current skills
- Goal how to achieve the next level
- Techniques to help to improve sales skills
- Motivation

According to Salminen (2018, p. 161-163) the process starts by understanding the need to develop. The next step is to examine current skills, what are the strengths and what needs improvements. After that the goal can be set and the needed actions defined in order to achieve the goal. Certain techniques help in making improvements. In sales they can be for example selling techniques, negotiation techniques and how to understand customer needs. Finally the motivation is in key role. Without motivation the result can be poor. Salminen (2018, p.163) also states that if you want to improve your sales skills, you should listen to top sellers. The employer is responsible for giving suitable training for the employee. It is the employee's responsibility to maintain and develop their own sales skills. (Salminen 2018, p. 172)

Salespeople also need training. According to Spiller (2022, p. 399-401) onboarding or organizational socialization is needed for the new employees to obtain the necessary knowledge, skills, tools and behaviours. Onboarding is a strategic process that lasts long, usually several months. The aim is to have smooth transition to selling. Once the program is done, the employee will shadow the current sales person immediately upon completion. Additionally indoctrinating is needed too to teach certain ideas, attitudes, cognitive strategies and professional methodologies to a new employee. Attention should be paid to both of these methods. (Spiller, 2022)

Sales managers have a great role when a new sales person is hired. Sales managers act as trainers, coaches, mentors and supervisors. Training has high importance and training is needed in order to learn the skills needed for salespeople. First there should be an evaluation of current skills and then an individualized training can be done. Coaching is needed to improve the sales skills. If there is no coaching, then the sales skills can remain the same or even regress. According to Spiller (2022, p. 391-393) mentoring gives the finishing touch to a sales person’s development. Sales managers teach how the actual work is done in the field. Additionally sales managers supervise the whole sales team. They must define the behaviours, activities and result which are monitored. (Spiller, 2022)

4.1.5 Use of Mentoring and Coaching in Knowledge Transfer

One way of transferring knowhow is through coaching and mentoring. Garvey et al. (2018, p. 59) see coaching and mentoring as a tool for preparation for new roles. It can also be used in problem solving. Spiller (2022, p. 407) sees coaching and mentoring as important resources that affect salespeople growth and development as professionals.

Coaching and mentoring are close to each other but differ slightly. According to Law (2013, p. 55) mentoring is a personal, development-centred approach. Coaching on the other hand is more performance-centred. Mentoring is a long-term relationship while coaching is short-term and can be linked to a certain project. Law (2013, p. 4) has illustrated the relationship between coaching, mentoring and psychology of learning overlapping as seen in Figure 7. (Law, 2013)

Figure 19. The relationship between coaching, mentoring and the psychology of learning (Law, 2013, p. 4).

According to Law (2013, p. 7) organizations use coaching and mentoring instead of traditional training. They need to develop their people and deepen their talent pool and make the people enhance their organizational learning capabilities.

In sales effective coaching should be part of the weekly routine, Spiller (2022, p. 407-408) states. Coaching can be used for many different purposes, for example identifying strengths and weaknesses after a sales call together with a salesperson, observing a meeting or listening a salesperson's telephone call, in inside sales trainings and discussing weekly with salespeople about the areas which they have trouble. A coach advices and helps the salesperson to grow and develop. According to Spiller (2022, p. 408) the best coaching tool is time, which sales managers give to their salespeople when coaching them on a one-to-one basis. (Spiller, 2022)

Spiller (2022, p. 409-410) defines mentoring as an interpersonal exchange between experienced and less experienced person. The mentor provides support and feedback in order to support the personal development of the mentee. Wisdom and experience is shared on one-to-one basis to accelerate the sales development of the mentee. When a company wants to have success in the mentor program, it should include the following components:

- Define clear roles and responsibilities for the mentor and mentee
- Host a kick-off meeting to launch the mentoring program

- Enable face-to-face conversations between mentors and mentees
- Define mutually agreed-upon milestones and expectations for mentor relationships
- Group meetings with best practice sharing and expressing appreciation to the mentors
- Opportunities to evaluate and give feedback from the program

Additionally there is an orientation that combines mentoring and coaching. Mentoring has a coaching approach. In this model the starting point is an equal cooperative relationship. According to Ristikangas et al. (2019, p.15) mentoring with coaching approach is:

- Committed to progress and encourages to experiments where the strengths and potential of the mentee is in use
- Based on trust and includes developing of shared thinking and mind skills applying
- Goal-oriented learning together, where both the mentor and mentee has an influence to each other

According to Ristikangas et al. (2019, p. 15) mentoring with a coaching approach can have an impact on the whole organization and can improve the cooperation inside the company.

4.2 Roles and Responsibilities – RACI Chart

When roles and responsibilities are clear, many problems can be avoided. According to Mäntyneva (2019, p.105) when roles and responsibilities are not clearly defined and communicated, then it is unclear who has the responsibility to do certain tasks. RACI chart is a tool that can be used for defining roles and responsibilities against tasks clearly. This is very important in sales teams, especially when key accounts are in question.

The acronym RACI is formed from words Responsible, Accountable, Consulted and Informed. Responsible person is the one who does the task. There can be multiple persons responsible for a certain task, but there should be one main responsible. Accountable person owns the task. The person makes sure that the task is done properly and finalized. Responsible person reports to accountable person. Consulted person is the one that gives advice or can be asked for more information. The communication is two-way communication between consulted person and responsible person. Informed person is notified how the work is proceeding. And communication is one-way communication. In the RACI chart each task should always have at least responsible and accountable persons. (Mäntyneva, 2019, p 106-107; Haworth, nd.). Figure 8 presents an example of a RACI chart template.

TASK	Role A	Role B	Role C	Role D	Role E	Role F
Task 1	R		A			I
Task 2	A	R				I
Task 3	R	A		C	I	
Task 4		A	R		C	

Figure 20. Example of RACI chart template.

As seen in Figure 8, on the left side of the chart there are certain tasks that are selected for a certain project or for example key account management. The roles are defined and set to the matrix as responsible, accountable, consulted or informed.

Mäntyneva (2019, p. 107) also explains that the RACI chart can be used not only for showing the responsibilities but also for estimating the workload of the participants. The RACI chart can be made as an upper level chart that shows the rough guidelines. The RACI chart can also be very detailed, and then it would include the people’s responsibilities and also the responsibilities in individual tasks. (Mäntyneva, 2019)

4.3 Conceptual Framework of the Study

The improvement ideas found from the relevant literature form the conceptual framework of this study and are shown in Figure 9 in visual format.

<table>
<tr><th colspan="4">CONCEPTUAL FRAMEWORK</th></tr>
<tr><td rowspan="2">CUSTOMER RELATIONSHIP HANDLING</td><td>CRM and CRM tool helping in account handling
(Reinartz, 2012)
(Baran, Galka & Stunk, 2008)</td><td>Improving sales skills by training and through development
(Salminen, 2018)
(Spiller, 2022)</td><td>Using KAM in customer relationship handling
(Mäntyneva, 2019)
(Reinartz, 2012)
(Wengler, 2006)</td></tr>
<tr><td colspan="2">Use of coaching and mentoring in knowledge transfer
(Garvey, Megginson & Garvey, 2018)
(Law, 2013)
(Spiller, 2022)
(Ristikangas, Ristikangas & Aaltola, 2019)</td><td>Using GAM in customer relationship handling
(Jobber, Lancaster & Le Meunier-FitzHugh, 2019)
(Hennessey & Jeannet, 2013)
(McDonald & Woodburn, 2011)</td></tr>
<tr><td>ROLES & RESPONSIBILITIES</td><td colspan="3">RACI chart
(Haworth, nd.)
(Mäntyneva, 2019)</td></tr>
</table>

Figure 21. The conceptual framework of this study.

As shown in Figure 9, the conceptual framework is divided into two main categories according to the findings in the current state analysis. The first category, customer relationship handling, includes ideas and best practices from key account and global account management and from customer relationship management with the help of CRM tool. The emphasis in customer relationship management is in improving the sales skills and knowledge transfer by mentoring and coaching due to the objective set in the beginning of the study. Best practices and ideas for improving sales skills and knowledge transfer were discovered during the literature review.

The second main category is roles and responsibilities and RACI matrix was in the centre of it. By using the RACI chart roles and responsibilities are easier to define and responsible persons are aware of the tasks they should take care of.

In Section 5 the conceptual framework is utilized to co-create the initial improvement recommendations for the sales account management process in the case company customer service team. The conceptual framework is used to eliminate the chosen weaknesses identified in the CSA stage.

5 Co-creating the Initial Improvement Proposal

This section describes the co-creation of the initial improvement proposal based on the findings in current state analysis and from the conceptual framework. This section provides an overview how the co-creation of the initial improvement proposal was carried out and summarizes the improvement proposal in more detailed manner.

5.1 Overview of the Proposal Building Stage

The aim of the proposal building stage was to co-create initial improvement proposal for the sales account management process in the case company customer service team. The case company had set a goal to re-allocate work from the sales managers to the sales coordinators in order to free time to the sales managers to hunt for new customers and handle current bigger accounts in deeper level. The sales coordinators would have a bigger role in customer account handling which means that they would take care some of the smaller customers instead of the sales managers.

The initial improvement proposal was co-created during the case company's sales meeting event in May. The meeting event lasted three days and was held in Flamingo Congress Center in Vantaa. The meeting was a hybrid meeting, since some of the participants could not fly to Finland due to restrictions during COVID-19 pandemic.

The briefing material had been sent to the participants a couple of days earlier before the event so that they could study and already think ahead improvement ideas and questions during the workshops. For this initial proposal building was reserved a two hour slot. The actual proposal building started with a 30 minute overview about the study in question. The goal, the findings from the CSA, the ideas from the literature and some improvement ideas with next steps and schedule for the possible change were presented. After the overview started the workshops in six different groups simultaneously. Each group had from five to seven participants and they were from the sales coordinator team, from the customer support team, from the specification team and from the sales manager team. Additionally there were participants from the upper management level. The beforehand selected sales coordinators took field notes in each group and presented the ideas and findings to all the participants.

The discussions in groups were active and rich and full of suggestions. The mixed teams worked well and suggestions had many different aspects. Five of the six teams were present in Vantaa and one group did the workshop in Microsoft Teams. After the sales meeting the field notes gathered during the workshops were send to the author of this study. The initial proposal was then compiled from the field notes after the sales meeting event. The initial improvement proposal was categorized according to the same logic as earlier in the study.

5.2 Co-creation of Initial Improvement Proposal for the Sales Account Management Process in case company Customer Service Team

As stated at the beginning of this study, the outcome was to propose improvements to the sales account management process in case company customer service team. The aim was the re-allocation of work in the case company’s customer service team. The sales coordinators would have more responsibility of the current customer base. In the following two subsections the co-creation of the initial improvement proposal is described in detail.

5.2.1 Improvement proposal for customer handling

In the case company the sales coordinators have been through multiple trainings in order to expand their sales skills. Program called “Skills to growth” had taken place already a couple of years ago. This led to a point where the sales coordinators independently started to handle one small account each on their own. This new potential change to widen the account handling to the next level is a continuum to previously learned skills and current work.

In the proposal building the emphasis was how to transit the current knowhow from the sales managers to the sales coordinators. The case company sees this as the most important issue to tackle properly. The customers are in the key role and the customer service level must be kept in high level even if the person that handles the account would change. This was well understood among the participants and they offered multiple suggestions to this problem.

Before the account change from the sales managers to the sales coordinators is done, many trainings must be completed. First of all, the basic training from the company's products, capabilities, processes and manufacturing places must be held. Without the basic knowledge it is hard to offer solutions to the customers. The basic product of course is familiar, but the portfolio has expanded and new products added. This requires the customer support's help, since they are the ones that have the best technical knowledge. This same suggestion came from multiple groups and was the very first proposal.

One group suggested that there should be an archive or library for frequently asked questions. This would help both the sales coordinators and the customer support in their work. The sales coordinators and also the sales managers could check if there is already an answer to a problem in question. The customer support would also benefit since they would not have to answer to the same questions over and over again. This would save time from all the parties. It was jointly agreed that this is something that is worthwhile to do.

Besides the product training there were discussion about the process training. The case company has expanded its portfolio from basic wafers to patterning wafers and to all kinds of special wafers. It means that there are different kind of processes that need clarification in order to be able to offer them to the customers. Also it would be beneficial to understand what kind of products the customers do and what kind of processes they have. That would deepen the sales coordinators knowhow and help them in the future.

One problem that occurred was the lack of knowhow how to use certain tools that are required in sales in deeper level. The basic use is in adequate level, although there are sometimes misunderstanding who is the responsible person for certain updating for example. Some of the participants had had troubles pulling out reports from CRM tool. For others that have use less CRM tool there are lot of functions that are not familiar. When an opportunity or quotation is made in CRM tool, it requires a lot of time and effort to get all correct information in place. Additionally there were discrepancy regarding if an opportunity can be closed as partially won in CRM tool or if it can be left open if it is made for several years ahead. The company has named a person that is responsible for developing CRM tool. There were a lot of requests to have more training and more guidance in order to make the tool more familiar and the use of it easy. CRM tool is in the centre, when it comes to changing the customer responsibilities from the sales manager to the sales coordinator. It holds information about the opportunities and the quotations as well as some information about the discussions and emailing. Therefore training how to use tools more effectively were added to improvement proposals.

A lot of time were used to discuss about the mentoring and the coaching. In order to transfer some of the customers to the sales coordinators, it requires a lot of information sharing. This information sharing is best to handle by mentoring and coaching. Mere transfer of information about the customer is not enough. Sales coordinators must be able to participate in the meetings, whether they are held in Microsoft Teams or face-to-face, and answer to all kinds of questions. Some of the customers are used to handle matters on the phone and the sales coordinators on the other hand use mainly emails to discussing with customers. So this was something that needed attention.

What should the mentoring and the coaching then include? It was the question that needed answers. There were a lot of suggestions given. It was said that the mentoring and the coaching should take place in many forms: face-to-face, in Microsoft Teams and also on the phone and by emails. The sales managers might have to travel either to Finland or the sales coordinators might have to travel to the customer location. It was discussed that the discussion between the mentor and the mentee should be two-way, both could learn from each other. There were discussion about making a mini account plan that would include the meetings, the contact information, the products that the customer is buying etc. Additionally the customers are all different and located in different places and have different kind of company culture and just different culture in general. These have to be taken into account in mentoring and coaching.

It was also discussed that some sort of apprentice approach might be in place. The sales coordinators should take part in the meetings and visits customers at some point. That way a new colleague could be introduced to the customer. The customer could get to know the person who will take care of them in the future. The sales coordinators after all have a very wide knowledge about the case company’s production and can help the customers in many ways.

Change of the title was one thing that arose in discussions. If the job description and responsibilities are changed, should the title be different than the current one? In Asia and Japan the title is very important. It has to be a manager or equivalent or the working with the customer comes very difficult. Question about the customer experience came up too. It was discussed whether the customer would feel demoted if just a sales coordinator would take care of them instead of a sales manager. This is something that needs further discussion. Nevertheless it was added as improvement proposal.

Since the company has customers in different continents it means that there are some delays in replying due to the time difference. It was discussed if there should be local sales coordinators at least in the US. In Japan there is already the local sales coordinator. What makes the US problematic is that they start working around the same time as the workers in Finland end their working day. Could local sales coordinators be the solution? Or could the responsible coordinator in Finland work in later shift? It was agreed that local sales coordinator could be the best solution, since the customers need real time service.

5.2.2 Improvement proposal for Roles and Responsibilities

In the case company the sales managers and the sales coordinators have different kind of roles, although the roles do cross to some extent. With the roles comes certain responsibilities although they are most times verbally instructed or mentioned briefly in the internal documents. That being said it is no wonder there are misunderstandings about the roles and responsibilities.

Currently there are some obscurity, who is responsible of which action when it comes to updating certain tools like for example updating Saletti for forecasting or updating CRM tool once the order has been received. These misunderstandings cause delay and unnecessary work, when both parties are either not doing their task or both updating the same thing twice. Also this effects of course to the reporting since the data is not accurate. Same kind of problem occurs with the production follow-up, which should be the planners' responsibility. Since the capacity has been fully booked, there is not time to do all the tasks as defined in job description. Therefore the sales coordinators have taken this task in order to be able to notify the customers if their order is going to be delayed. In the group discussions this obscurity with roles came up several times and some sort of clarification was needed. One suggestion was a RACI chart that was presented during the May sales meeting during another training just an hour earlier. With RACI chart roles and tasks could be defined clearly and the process would be leaner and confusion about the responsibilities would vanish. This does not exclude the fact that with limited resources and with full capacity one must do prioritization. It means that there is no time to do all tasks as defined.

Working in three continents causes problems due to the time difference. Currently the most of the sales coordinators are working in Vantaa and one local sales coordinator in Japan. If the aim is to expand the sales coordinator's role, it would mean that there would be a need for local sales coordinators. The US customers would of course like to have the answers to their questions during the same day. If the sales coordinator is located in Vantaa, it is not possible to answer the same day unless there would be changes to working hours. One problem remains though. Since the main office is located in Vantaa, there is no one to answer for example to production related questions after the office hours. It means that the local sales coordinator would need to have very wide knowledge about the processes and exporting. After a very fruitful conversation the initial improvement proposal was the local sales coordinators to take care of the customers.

So far the sales coordinators have taken care of the inquiries through the company website in some extent. For the customers in Europe the first contact is the sales coordinator. For the US customers the same do not apply. If the customer is already existing then the responsible coordinator should take care of the request. Unfortunately the requests usually come during the evening in Finnish time so the first contact in that case is either the sales manager or the customer support. In Asia the first contact is usually the sales manager, the customer support or the local agent. So all the continents work a little bit differently. This is something that cannot be solved by using the same solution to all the continents. The groups agreed that the improvement proposal was to define the responsible person or persons for website inquiries to each continent separately. This way others could just ignore the inquiry and the dedicated person would take care of it either independently or by assigning it to another appropriate person. This kind of solution would also benefit the sales managers to use their time more efficiently.

Additionally there was a question about the contact person, if the customer is totally new in the website inquiry. There were debate about this matter to some extent. It is easy to say that the sales coordinator should answer to the request. But the fact is that the customer support has more knowledge about the customers and their connections to other customers. The question were left open and initial improvement proposal was to define the responsible person for website inquiries. This will need more time to think through and find the best possible solution for the problem in question.

Since the aim is to give bigger roles to the sales coordinators, there were discussion about the customer base and if specialization is needed. One question that arise was if all coordinators would specialize to certain customers (only for the key accounts or smaller accounts) or would there be mixed roles? At the same time there was a question about the role versus workload. What would be done if the workload would be too big? Should the workload be even out? Is there going to be more sales coordinators? The initial improvement proposal was to have equal workload. If some sales coordinator would have too much to handle, then some other sales coordinator could take some of the workload from that person. For the sales coordinator role the proposal was to have some sales coordinators to focus only for the key customers and others only for the smaller and middle size customers, which means that the sales coordinator would take care of the smaller and middle size customers independently. At this point it is not easy to estimate what kind of changes are needed in order to expand the sales coordinator role. This was very obvious during the conversations in the groups.

5.3 Summary of the Initial Improvement proposals

The proposal building took place in the May sales meeting that lasted three days. For this initial improvement proposal building part was reserved two hours. The initial improvements proposal was co-created together with the sales coordinators, the sales managers, the customer support and the specification engineers. Total 39 people participated and helped to co-create the initial improvement proposal. The participants were divided into six different groups and each group had people in every department in order to receive input from very wide range. The participants were eager to give their input and help to improve the process and give their suggestions. What highlights the participation is the chance to really have an influence on your own work and how it is done in the future. Figure 10 shows the co-created initial improvement proposal for the customer relationship handling.

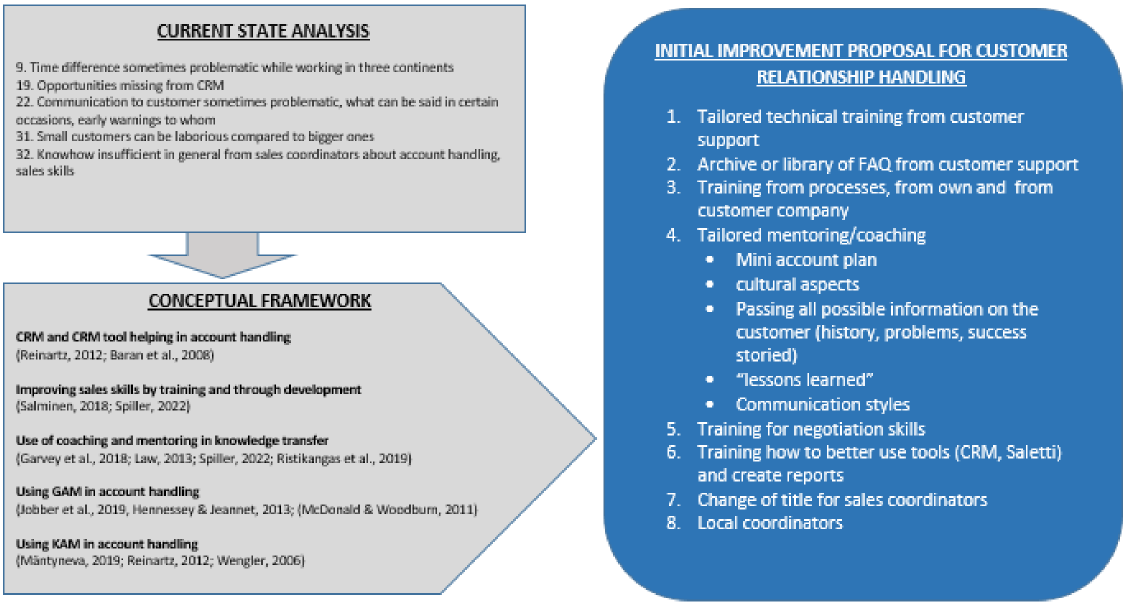

Figure 22. Summary of the initial improvement proposal for the customer relationship handling.

In Figure 10 there are the eight initial improvement proposals regarding the relationship handling that were discovered during the proposal building. Most of the improvement proposals focused on mentoring and coaching and how to transfer knowledge from the sales managers to the sales coordinators. This was a strategic choice done by management. Four of the five weaknesses discovered during the CSA received improvement proposals. The weakness number 31 which was about handling smaller customers and how laborious they can be did not receive any direct improvement proposal. Each customer is individual and should be handled accordingly.

In conceptual framework the emphasis was in the knowledge transfer. The global account management was discussed briefly. The customer division will be done by the Vice Presidents of each market area and by the Chief Commercial Officer. It was announced during the sales meeting that the case company will transfer some of the customers to global accounts. The key accounts will remain but the amount will grow. In the coaching and mentoring the account management in general will be introduced in deeper level to the sales coordinators. It will include mini account planning, contacting and contact mapping and pricing among other things. Figure 11 presents the co-created initial improvement proposal for the roles and responsibilities.

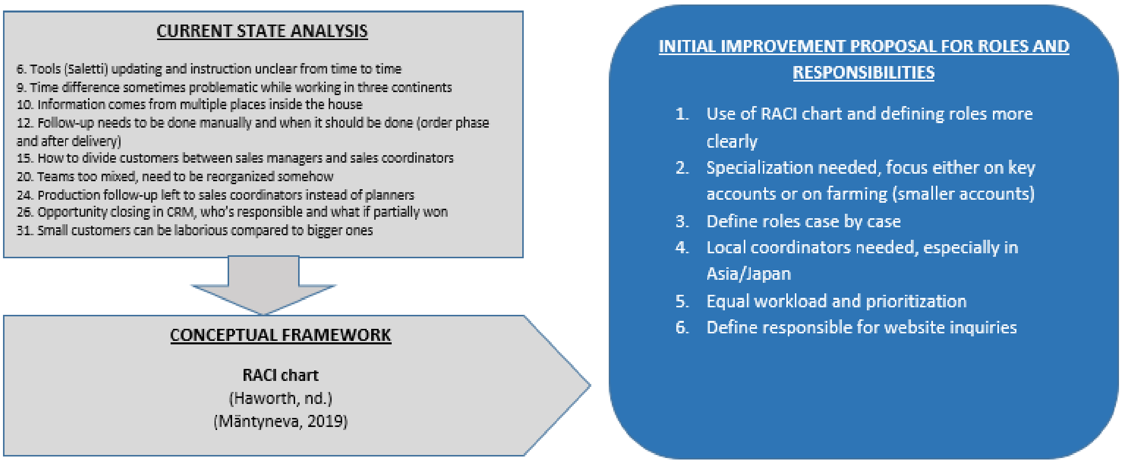

Figure 23. Summary of the initial improvement proposal for the roles and responsibilities.

In Figure 11 there are six improvement proposals regarding the roles and responsibilities. RACI chart were introduced during one of the earlier held trainings during the May sales meeting and it was found useful for many of the weaknesses regarding the roles and responsibilities.

Seven from the nine weaknesses discovered during the CSA received improvement proposals. For the weakness number 10, which was about information flow from inside the factory, did not have an improvement proposal. The problem is that the responsible person need to be known in order to receive answers. But what if you don't know who is responsible for certain area? Therefore weakness number 10 were left without the improvement proposal. Weakness number 20 was about the teams being too mixed. Each customer has a dedicated team that has individually selected sales manager, sales coordinator and customer support member. Since there are currently about ten persons in each group, it leads to a multiple options of persons taking care of the customer. It can be hard to remember who is responsible of which customer and the teams become very mixed. This issue was discussed during the proposal building, management included and there is no easy fix for this problem. Therefore it did not receive any improvement proposal.

The conceptual framework concentrated only for RACI chart, since it could solve multiple weaknesses that were discovered during the CSA phase. RACI chart is a very versatile tool that can be used in many occasions. It really helps to define the responsible persons. To define each role and task requires a lot of time and therefore it could not be done during the proposal building.

This completes the initial improvement proposals building section. The next section describes the validation of the proposals and presents the final proposals for improving the sales account management process.

6 Validation of the Proposals

This section describes the results and adjustments made to the co-created initial improvement proposal. First there is a short overview of the validation stage. Next follows description of the feedback received and adjustments made to the improvement proposal according to the feedback. Final proposal are presented in the next section. Lastly there is section for recommendations and action plan presented.

6.1 Overview of the Validation Stage

The validation of the initial improvement proposal was performed by presenting the initial improvement proposals to the Customer Service Manager and to the Vice President of European Sales, who also was the originator of this thesis. The Customer Service Manager took part in all Data gathering stages, starting from the current state analysis, then participating in the initial improvement proposal building in one of the groups and also was selected to give feedback in this validation stage. The Vice President of European Sales was the starter for the thesis and took part in building the initial improvement proposal in one group. Both of the participants were closely involved in the process all the way from the very start.

The validation workshop was conducted online, in Microsoft Teams. The aim was to evaluate if the proposal would be doable and effective. Both of the participants had been present when the objective and the outcome of the thesis were defined. Both of them were also aware of the weaknesses of the current state analysis. The weaknesses had been presented to the Vice President of European Sales earlier and gone through together more thoroughly in order to make the selection of which categories would be taken into account. Also the findings from the literature were presented to both of them before the proposal building. The findings from the literature were part of the internal training that included the proposal building during the May sales meeting.

The initial improvement proposal was reviewed together. Each of the proposal was examined, assessed and discussed and the feedback was gathered as field notes. Based on the feedback received in validation phase, the initial improvement proposal were adjusted. The adjusted improvement proposal form the final recommendations of this study.

6.2 Adjustments to the Initial Proposals

The feedback given to the initial improvement proposal was positive. All participants knew the importance of the thesis to the case company and took already part in the solution building. Since the improvement proposal was made for two categories, there are two tables to show the refined improvement proposal. Table 7 shows the refined improvement proposal for the customer relationship handling.

Table 15. Summary of changes made to the initial improvement proposal for the customer relationship handling.

Co-created initial improvement proposal	Refined Improvement proposal
Tailored technical training from customer support	Tailored technical training from customer support
Archive or library of FAQ from customer support	Archive or library of FAQ from customer support
Training from processes, from own and from customer company	Training from processes, from own and from customer company
Tailored mentoring/coaching • Mini account plan • cultural aspects • Passing all possible information on the customer (history, problems, success storied) • "lessons learned" • Communication styles	Tailored mentoring/coaching • Mini account plan, contact mapping, decision making process • cultural aspects • Passing all possible information on the customer (history, problems, success storied, future) • "lessons learned" • Communication styles • Two-way information flow
Training for negotiation skills	Training for negotiation skills
Training how to better use tools (CRM, Saletti) and create reports	Training how to better use tools (CRM, Saletti) and create reports
Change of title for sales coordinators	Change of title for sales coordinators ->Depends on the job description
Local coordinators	Local coordinators in Japan and Europe ->Local coordinator in US and in Asia in the future ->Roadmap needed
	Confrontation with customers-training

As shown in Table 7 there were five improvement proposals that had no changes. Some adjustments were made to the mentoring and coaching proposal but it mainly stayed the same. The proposal of change of the title was somewhat accepted. It was discussed that if there would be a change to the title, it would require a clear change in work and in job description. It was suggested that there would be three different kinds of sales coordinators in the future, the ones that would continue the current work, the ones that would focus only to serve small and middle size customers with the same way as the sales managers do and the third one that would have a mixed job description. The evaluation of the three different positions is currently ongoing.

For the proposal of the local sales coordinators it was stated that there is already local sales coordinators in Europe and in Japan. But there is no local sales coordinator in Germany, since all of the European sales coordinators work in Finland. The need of the local sales coordinators have been recognized and it cannot bypassed. The customers want to have answers rapidly and without unnecessary delays. This is a factor that has an impact on the customer experience. If the replies are delayed, the experience will be negative. The fact is that the local sales coordinators are going to be the future. The Customers in the US and in Canada need the local sales coordinators to support them locally and in real time. Additionally the sales office in the United States has presented the request few times already. It was discussed that for this future change a roadmap is required.

One additional proposal that was added was the training for confrontation with customers. Even though there were proposals for different kind of trainings, the training how to handle the confrontation with the customer was missing and therefore added to the proposals.

As the Table 7 showed the importance of training is understood in the company. Both the company and the employees understand the importance of proper training. Taking care of the customer is extremely important to the company since it has defined it as one of its core competences. There are already lots of trainings done and ongoing but more tailored trainings are needed.

Table 8 shows the initial improvement proposal for the roles and responsibilities and the changes that were made. And as can be seen from the table 8, there were much more changes to initial improvement proposal compared to the customer handling initial improvement proposal.

Table 16. Summary of changes made to the initial improvement proposals for the roles and responsibilities.

Co-created initial Improvement proposal	Refined Improvement proposal
Use of RACI chart and defining roles more clearly	Use of RACI chart and defining roles more clearly
Specialization needed, focus either on key accounts or on farming (smaller accounts)	New suggestions to job descriptions
Define roles case by case	~~Define roles case by case~~
Local coordinators needed, especially in Asia/Japan	Local coordinators in Japan and Europe ->Local coordinator in US and in Asia in the future ->Roadmap needed
Equal workload and prioritization	Equal workload and prioritization ->Need to be reviewed and balanced if needed
Define responsible for website inquiries	Define responsible for website inquiries Development of New customer check process
	Role map for the whole company, including name, telephone number, title and responsible area

Table 8 shows the initial improvement proposal for roles and responsibilities and it also shows the changes that were made in validation phase. The only initial improvement proposal that did not have any changes was the use of RACI chart and defining the roles more clearly. One initial improvement proposal was erased and it was defining the roles case by case. The group discussed about this matter and noted that there is no point defining the role each time separately. The roles must be defined in advance.

The rest of the initial improvement proposals received some fine tuning. The initial improvement proposal regarding specialization was replaced with new suggestions about job descriptions. This is basically the same solution but with different approach that already was introduced in the customer relationship handling. In customer relationship handling the matter was with the title that the sales coordinator would use. With the roles and responsibilities the same solution applies to the initial improvement proposal regarding the specialization, the sales coordinator would either do the current work or handle the smaller and middle size companies. Additionally the role of the local sales coordinator was discussed. This was something that was already discussed when the initial improvement proposal was introduced in the customer relationship handling. The same solution applies here but the approach to the matter is different. As stated earlier, the local sales coordinators belong to the future and roadmap is needed for the change.

Then the discussion about the equal workload started. It is very difficult to estimate how much time a single customer requires, since it depends on so many different things. A small customer can be very laborious and a big customers on the other hand very easy to handle. Sometimes the workload can be very heavy and in other times there is no pressure and the customers are very easy to handle. Also if there are reclamations ongoing, those are very time consuming to handle. So the workload must be reviewed and balanced if needed. This is related to the future role that the sales coordinators will have. With the new role the workload will increase and balancing will be needed.

One more improvement proposal was added and it was a role map to the whole company. The role map should include person’s name and title, the phone number and from what is the person responsible for. This would help tremendously in the internal communication. The company has hired a lot of people and will hire in the future too due to the expansion of facilities. And this proposal also tackles one of the weaknesses discovered during the CSA phase, namely when the information comes from all over the factory. On many occasion the email for example is send to a certain group and no person is named as the responsible person. Answers can be delayed since nobody takes the responsibility because the email and the task in it is not assigned directly to anyone.

6.3 Final Proposals

The final proposal for the improvement proposal for the relationship handling and for the roles and responsibilities are presented in Figure 12. The proposals are categorized the same way as in the conceptual framework and in the initial proposal.

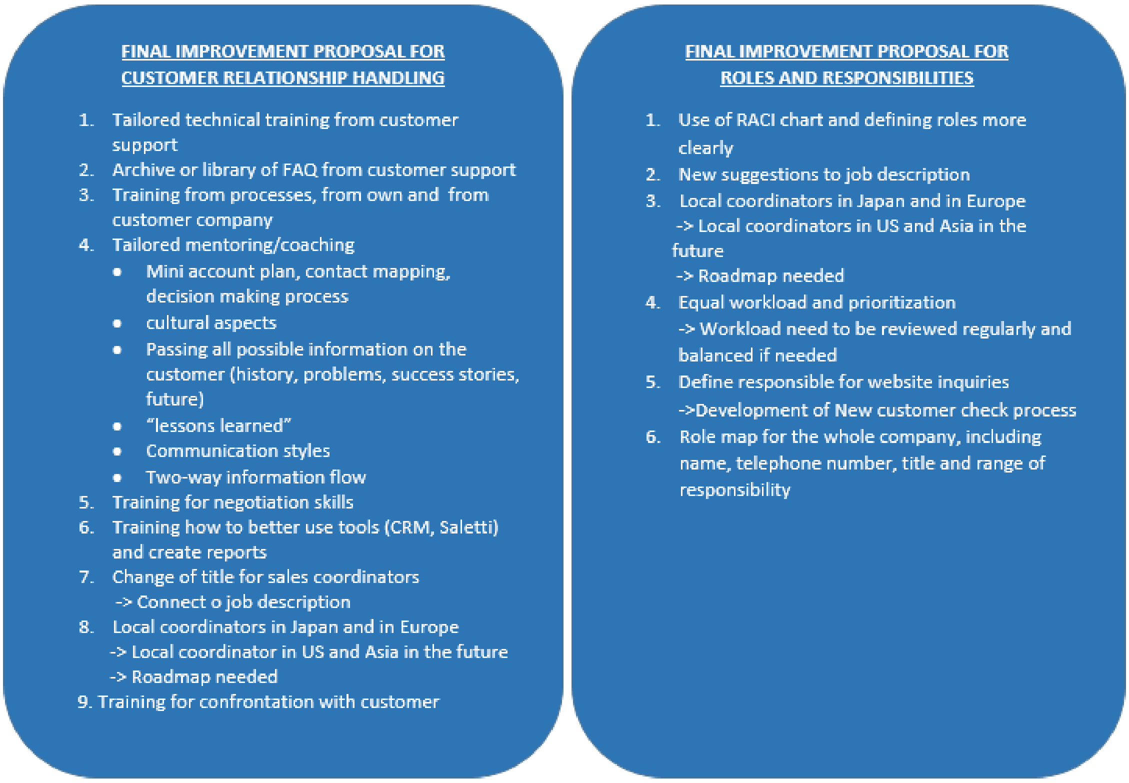

Figure 24. The final proposal for improvement proposal for the relationship handling and for the roles and responsibilities.

Figure 12 shows the final proposals that were created according to the feedback received during validation. Final proposal for the improvement proposal for customer relationship handling had total nine proposals. From those nine proposals three were adjusted according to the feedback received during validation. One additional proposal was added to the list. Final proposal for the improvement proposal for the roles and responsibilities had more changes. Only one proposal stayed the same and it was the proposal regarding RACI chart. One proposal was deleted and one changed almost entirely. The rest of the proposals were adjusted according to the feedback received during validation. Additionally one proposal about the role map to the entire company was added.

This completes the proposal validation section. The seventh and the final section summarizes the study, recommends the next steps toward implementation of the improvement proposal in the case company and provides a self-evaluation of the study.

7 Conclusions

The final section of this study includes executive summary, recommendations for the practical next steps for implementing the proposed improvement proposals, self-evaluation of the study and its results and closing words.

7.1 Executive Summary

The objective of the study was to propose improvements to the sales account management process in the case company’s customer service team. The case company announced in May 2022 that it is investing nearly 400 million euros to build a new fab and more than double the production capacity. The case company is preparing for the future and changes are needed also in the sales account management process.

The research approach of the study was design research with qualitative research method. The study was conducted in four stages. The first stage was current state analysis. As a result the process map was created and the strengths and weaknesses discovered. The literature review was the second stage. It focused on finding solutions to the selected weaknesses discovered in the current state analysis and formed the conceptual framework. Third stage was the co-creation of initial improvement proposal together with the relevant stakeholders. The fourth and final stage was the validation stage where selected key stakeholders gave feedback from the initial improvement proposal and final improvement proposal was adjusted accordingly.

The current state analysis was performed by the relevant stakeholder interviews. Six interviews were held and strengths and weaknesses discovered. The findings from the current state analysis were divided into the following categories: customer relationship handling, roles and responsibilities, communication, working methods, tool issue and miscellaneous. Customer relationship handling and roles and responsibilities were selected as the weaknesses that needed to be included in the study. They were estimated to be the key improvement areas.

After the current state analysis the relevant literature was searched in order to find best practices and existing knowledge to tackle the weaknesses discovered in the current state analysis. The literature review formed the conceptual framework of the study.

The findings from the current state analysis and the conceptual framework were introduced to the relevant stakeholders before the workshops for the initial improvement proposal building begun. The initial improvement proposal building was done in six workshops which were held simultaneously. A very large group of relevant stakeholders participated in the proposal building: the sales coordinators, the sales managers, the customer support team and the specification engineers. Additionally there were participants from a higher level of the organization. The co-created proposals were gathered and divided into two categories: improvement proposal for the customer relationship handling and improvement proposal for the roles and responsibilities.

The customer relationship handling had eight improvement proposals. Half of the proposals concerned training. There seems to be a need for a specific trainings in the company. The main improvement proposal was the tailored mentoring and coaching in order to transfer the knowledge from the sales managers to the sales coordinators. It was discussed during the workshop that the best way to transfer knowledge is to do it by using mentoring and coaching. The roles and responsibilities received less improvement proposals. Six proposals were co-created in the workshops regarding the roles and responsibilities. There seems to be a need for RACI chart. On many occasions clearly defined roles and responsibility areas would help to avoid confusion.

The initial improvement proposals were validated by the managers from the sales and from the customer service. Each initial improvement proposal was examined thoroughly. Five of the initial improvement proposals from the customer relationship handling were accepted as they were. Three of them were adjusted and one new proposal was added. The new proposal was for an additional training about confrontation with the customer. The initial improvement proposals for the roles and responsibilities were adjusted almost entirely. Only one proposal regarding the use of RACI chart was accepted without changes. One proposal was deleted and three proposals were adjusted. One new proposal was added and it was a role map for the whole company. The role map could benefit the case company tremendously in the future.

The final improvement proposal provide a comprehensive set of actions to improve the sales account management process in the case company’s customer service team, if they are implemented. Few of the proposals can be extended to the whole company and all will benefit.

7.2 Practical Next Step Recommendations

The aim for this study was to improve the sales account management process in the case company’s customer service. The sales coordinators would take a bigger role by taking some of the workload from the sales managers.

The sales coordinators must have sufficient knowledge of the products and processes. Therefore technical training is mandatory. They also need training about sales techniques and how to deal with the customer. Training for using the tools efficiently is needed. This will help to save time and have more time for the customer relationship handling. Once these trainings are ongoing and possibly in some extent completed, the mentoring and coaching can start.

Mentoring and coaching will take time and is not done in a month or two. It requires time and effort from both the sales coordinator, who is learning and from the sales manager, who is coaching and mentoring. The mentoring and coaching has so many elements that it is difficult to estimate, how long it takes to transfer the know-how.

This change should start with a piloting. The piloting is best to start in Europe first. When the customer change from the sales manager to the sales coordinator is done and the sales coordinator is taking care of the selected customers, the success of this change can be evaluated. The feedback received from the customers defines if the change was successful or not. When the feedback from the change has been received, adjustments can be made to the trainings and mentoring and coaching. If the feedback is extremely poor, then it is time to think other solutions.

7.3 Self-Evaluation of the Study

In order to make a credible study, validity and reliability should be taken into account in the very beginning of the study, already in the planning phase. Credibility consists of reliability and validity. By reliability Kananen (2013) means that if the research is repeated, the same result would occur. If the correct things are research, then the study has validity. Validity can be divided to external and internal validity. Credibility can be improved by proper documentation. Triangulation is also a part of the credibility. Data must be drawn from multiple informants or places, theory and literature comes from multiple sources and methodological methods are used. (Kananen, 2013, p. 177, 183-199).

The logic behind the thesis was set in the beginning when the research design was planned. The study followed the defined steps from the beginning (current state analysis) until the very end (validation stage). Some of the stages took longer and others were completed fast.

The objective of this study was to propose improvements to the sales account management process in the case company's customer service team. As an outcome of this study, a comprehensive set of improvement proposals were formed and validated by the case company's managers. The outcome fulfils the objective that was set for this thesis.

The current state analysis was done together with the relevant stakeholders. It was very interesting to map out the whole process and get information how things are actually done. According to the findings in the current state analysis, the relevant literature was explored. This proved to be the hardest phase in the process, since there are a lot of material available and defining the correct keywords can be tricky. The literature search took perhaps too long, but on the other hand there were a lot to learn.

The categorization of the findings from the current state analysis was a bit difficult. It was not always clear what category would be the most suitable. Therefore there were weaknesses that had multiple categories. It made the literature search a bit more complicated.

The initial improvement proposal building was done in May during sales meeting. Two hours were reserved and it was well used. It was actually a very good idea to build the proposal during the sales meeting, since there were participants from different departments and they all gave valuable input and had a different kind of view for the proposals. Although when a big group of people are making suggestions, some dominate the conversation and others might just listen. Nevertheless total 14 initial improvement proposals were co-created. Since there were so many participants, there were a lot of questions and comments. The selected sales coordinators took the field notes that were used while making the initial improvement proposal.

The final improvement proposal was examined and validated by the selected managers. The improvement proposals were mainly for the sales account management process but there were actually two other improvement proposals that would benefit the whole company. The relevance of the thesis is high for the case company. The company is already implementing the improvement proposal and planning the next steps.

7.4 Closing Words

Industrial Management Master’s Thesis projects have a specific and concrete objective and outcome. This project produced improvement proposals to the sales account management process in the case company’s customer service team. By implementing the improvement proposals, the case company can make the sales process work better and strengthen the sales. A strong and effective sales team is an asset now and in the future.

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