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Improvement Proposal to the Sales Opportunity-Case Function Process for ABB Oy

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Abstract

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The objective of this thesis was to analyse and provide recommendations for improving the new internal Salesforce Sales Opportunity case function process for ABB Oy. The business problem of requesting quotations between Local Service Units and Service Supply Units was complicated and there was lack of visibility to the sales opportunities.

This thesis was based on stakeholder interviews, salesforce data analysis and best practises theory. The thesis was carried out in three phases. The first phase included performing a current state analysis of the Opportunity case function process. The second phase included researching relevant literature for proposing suggestions to the identified weaknesses in the current state analysis. The final phase included developing the proposal based on the literature and stakeholder suggestions.

The weaknesses identified in the current state analysis included resistance to change, from the Service Supply Units, Service Supply Units not being aware of the new process and lack of a clear plan and communication for the roll out phase of the process.

The outcome of this thesis is process data analysis, trend analysis and improvement recommendations to the Sales Opportunity case function process. Based on the results of this thesis, it would be advisable for the case company to make a proper roll-out plan for the opportunity case function process for achieving good process implementation. The company would also benefit from improving the communication between the managers and Service Supply Units to reduce the resistance of change and improve the awareness regarding the process. The outcome of this thesis will help the case company to improve the implementation and change management for the process before new Local Service Unit Countries will be rolled-out.

Keywords: Salesforce, Sales Opportunity, Change Management, Local Service Unit, Service Supply Unit

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Tämän insinöörityön tavoitteena oli analysoida kohdeyrityksen uutta sisäistä tarjouspyyntöprosessia ja laatia kehitysehdotuksia tarjouspyyntöprosessin parantamiseksi. Insinöörityön lopputulos sisältää tarjouspyyntöprosessin data-analyysin, trendianalyysin ja kehitysehdotuksia tarjouspyyntöprosessin käyttöönoton parantamiseksi.

Tämä insinöörityö perustui haastatteluihin, Salesforce-datan analysointiin ja aiheeseen liittyvään kirjallisuuteen. Insinöörityö tehtiin kolmessa vaiheessa. Ensimmäinen vaihe sisälsi nykytila-analyysin. Toisessa vaiheessa tutkittiin nykytila-analyysissä tunnistettujen heikkouksien liittyvää kirjallisuutta. Viimeisessä vaiheessa luotiin kehitysehdotuksia kirjallisuuden ja haastatteluiden pohjalta.

Haastatteluiden ja yrityksen sisäisten dokumenttien tutkimisen pohjalta muodostettiin nykytila-analyysi tarjouspyyntöprosessin käytöstä kohdeyrityksessä. Havainnoidut nykytilan heikkoudet olivat työntekijöiden epätietoisuus prosessin käyttöönottoon liittyen, muutosvastarinta prosessia kohtaan, puutteellinen kommunikaatio muutosprosessin aikana ja puutteellinen muutosprosessin läpiviennin suunnittelu.

Insinöörityön lopputuloksena syntyi data-analyysi prosessiin liittyvästä datasta, trendianalyysi ja kehitysehdotuksia prosessiin liittyen. Tulosten perusteella yrityksen olisi suositeltavaa tehdä käyttöönottosuunnitelma prosessin tavoitteiden saavuttamiseksi. Kohdeyritys hyötyisi kommunikaation parantamisesta ja tiedottamisesta muutosprosessiin liittyen. Seuraavat suositellut toimenpiteet yritykselle on panostaa muutosprosessin suunnitteluun, kommunikaation parantamiseen ja keskusteluiden käymiseen työntekijöiden kanssa. Insinöörityön tulokset auttavat kohdeyritystä kehittämään muutosprosessin läpivientiä ennen kuin tarjouspyyntöprosessin käyttöönottoa jatketaan muissa maissa.

Avainsanat: Salesforce, Myynti, Muutosprosessi, Tarjouspyyntö, Myyntiyksikkö

Contents

List of Abbreviations

SSU: Service Supply Unit.

LSU: Local Service Unit.

1 Introduction

Change implementation at a company level is thought to be routine action, however it requires close examination. The need for change can be based on an internal development process such as introduction of CRM system and communication processes. (Lauer 2021:6)

Ignoring the change implementation may lead to challenges. In addition to the mechanical process of change, the support and collaboration of employees are needed. There is not only one way to successfully manage change, many methods and management techniques can be used. (Lauer 2021:3.)

This thesis proposes improvements to the current opportunity case function process of the case company.

1.1 Business Context

The case company for the engineering work is a global technology company ABB Oy. This thesis focuses on the Motion Business Area of ABB Oy. Moreover, the focus is on the Motion Service division of the Motion Business Area. The thesis work is carried out for the Service Supply Unit Drives Finland of the Motion Service Division.

The Motion Service division has an annual 38 million revenue (Internal document). ABB Motion Service provides services for motors, generators and drives globally. The Motion Service department has 3000 employees globally and has services in more than 70 countries and 600 service partners. (Guggisberg 2022.)

1.2 Business Problem

The current process of creating Sales Opportunities and answering them on Salesforce between Local Service Units (LSUs) and Service Supply Units (SSUs) has not been transparent for the Service Supply Units at the case company. Figure 1 illustrates the Sales flow at the case company to understand the business problem.

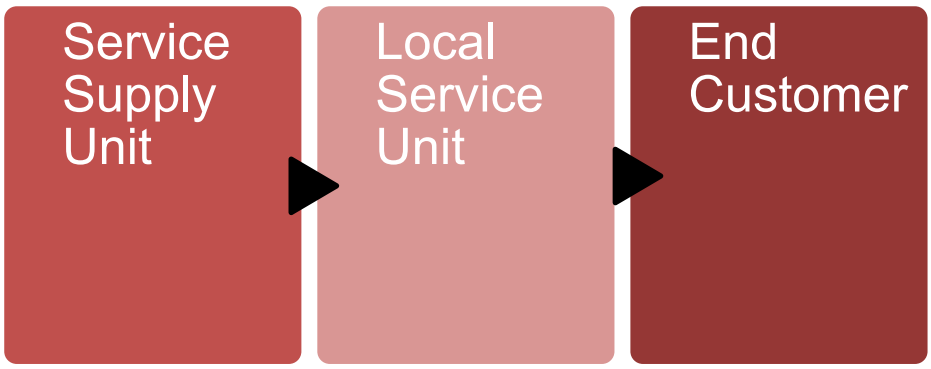

Figure 1. The sales process participants overview at the case company.

As seen in figure 1, the sales opportunity process involves three separate units. Service Supply Units (SSUs) are the backend operators in the sales process at the case company. Local Service Units, (LSUs) are the front-end operators of the sales process. The LSUs are the operators which communicate to the end customers of the case company. However, SSUs communicate with LSUs regarding sales cases. LSU may need an SSU quote before making an offer to the end customer. After receiving the quote from SSU, LSU continues the sales process with the end customer.

Currently it is challenging for SSUs to utilize existing information from the Salesforce system regarding sales business opportunities information and predict future sales. Only LSUs can see the sales opportunity data from the end customers and not SSUs.

The problem for now has been lack of information from the LSUs to the SSUs regarding won sales opportunities and the value of opportunities with SSU cases. Moreover, there has not been sale amount data and predicted sales information on Salesforce available to SSUs. For the LSUs the problem has been complicated quotation request process. There has not been a common way of communicating the sales opportunity information between LSUs and SSUs.

In February, the company begins a new sales opportunity-function process, which aims to make the information sharing between LSUs and SSUs more effective and useful. Furthermore, the new process should help SSUs to view the the necessary sales opportunity data.

1.3 Objective

The objective of this thesis is to develop a proposal of improvement actions to the sales opportunity case function process. The improvement proposal is built by conducting interviews with the stakeholders of the company, investigating data of Salesforce and reviewing literature of best practises related to the topic.

The scope of this thesis focuses on analysing the new process and suggesting improvement actions to the process. Many different SSU countries are involved in the process, but this thesis focuses on SSU Drives Finland.

1.4 Intended Outcome

The Intended Outcome of this thesis is an improvement proposal to the sales opportunity-case function process.

The case company will benefit from this study by having a clear proposal of what actions need to be taken to improve the sales opportunity case process and collaboration between Local Service Units and Service Supply Units. The proposal will include recommendations for improving the process thus that the

case company can improve the process before launching the process to new Local Service Unit countries.

2 Method and Material

This section provides an overview of the methods and material that will be used in this thesis. The chapter includes the research design, project timeline and data collection and analysis components. The research design illustrates the research strategy of this study. The project timeline illustrates the thesis phases on a timeline. The data collection and analysis demonstrates the data to be gathered and methods how the data will be collected.

2.1 Research Design

Figure 2 demonstrates the Research Design of this thesis. It visualizes the data sources for each stage and outcome of each stage of the thesis.

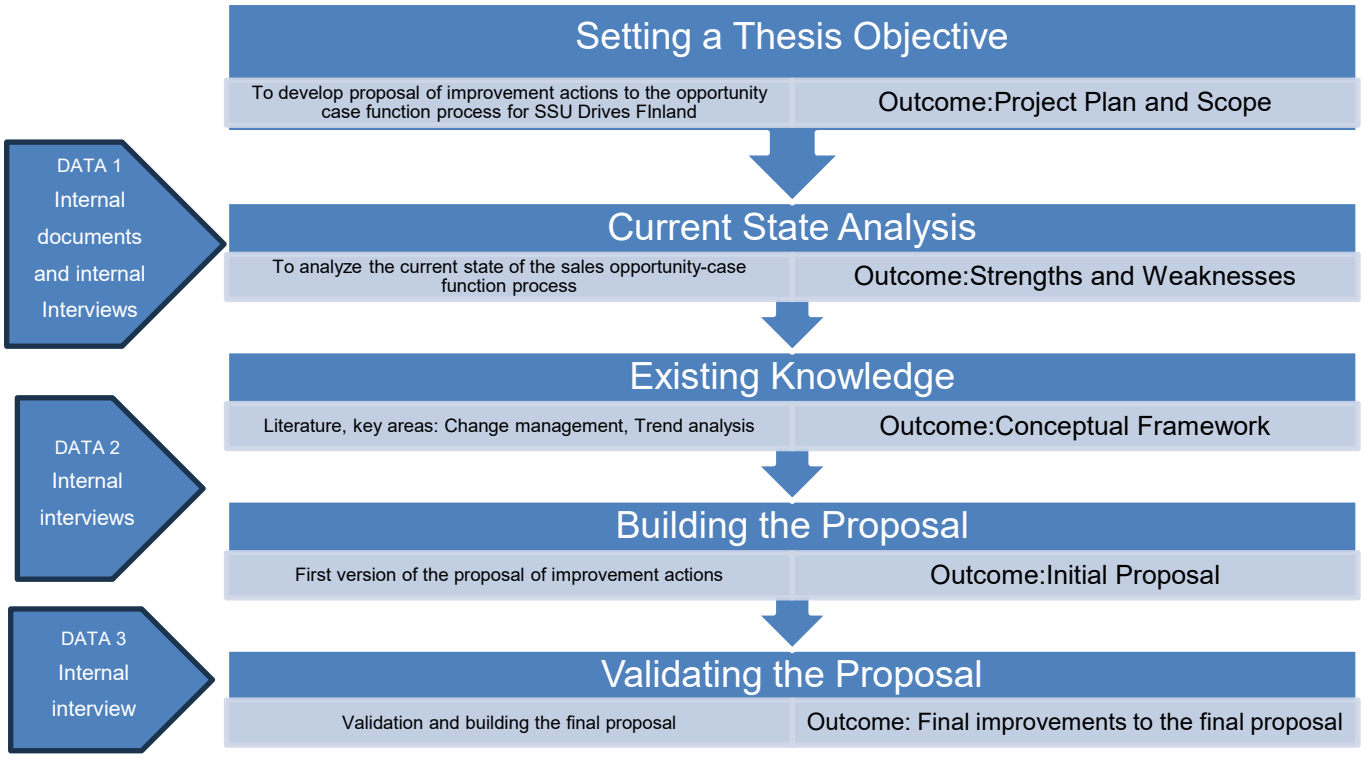

Figure 2. Research design for this thesis.

As shown in figure 2, the first part of the thesis project is to set the thesis objective. After setting the objective, the next stage will be creating a project plan to meet the objective and set the scope for the thesis.

The next stage is the current state analysis. The Current State will be investigated by interviewing stakeholders of the case company, analysing data from Salesforce and other internal documents. A current state analysis will be conducted to determine which subjects need more investigation. The outcome of the Current State analysis will be a strengths and weaknesses table of the current sales opportunity case process.

The literature review will be done based on the outcome of the Current State Analysis phase. The literature review related to the topic will be explored for ideas to improve the weaknesses of the current situation. The literature review of this thesis will include best practices in relation to sales opportunities, measurement and Salesforce. The outcome of the literature research will be the conceptual framework. The development of the Conceptual Framework for the thesis will be done based on the found weaknesses and reviewing existing knowledge.

Based on the best practices theory and interviews with stakeholders, the initial proposal will be built. The initial proposal will also take into account the improvement ideas from the stakeholders.

The validation stage includes reviewing the initial proposal with the Local Sales Manager and Sales Manager of the case company. After the review, final adjustments for the proposal can be made and suggestions for next steps can be described. The outcome of the validation phase is the final proposal for the case company.

2.2 Project plan

This chapter presents the project plan for the thesis. Figure 3 below illustrates the project plan and timeline for the thesis.

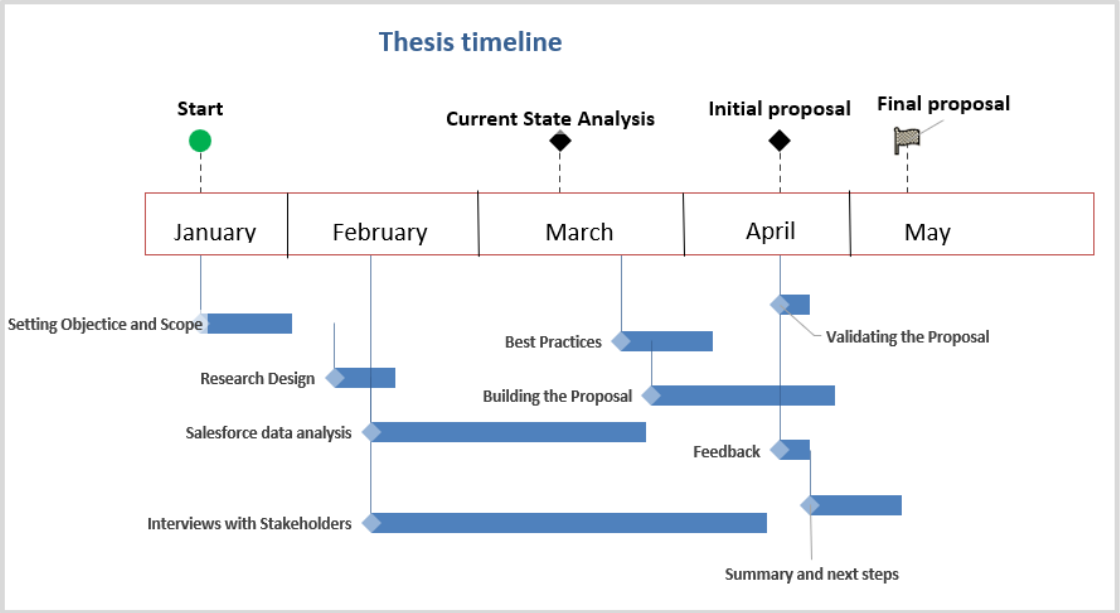

Figure 3. Timetable of the thesis.

As shown in figure 3, the thesis includes different main phases. These are Current State Analysis, initial proposal and final proposal. These phases include different tasks that can be seen in figure 2, marked in blue.

This thesis was carried out from January until May. The objective and outcome for the thesis were scoped in February. Current State Analysis was ready in

March. Literature research was ready in April. Initial proposal was ready on 17 April 2024.

Final proposal was ready on 29 April 2024. Final presentation and report to the case company was ready in May.

2.3 Data Collection

Data is planned to be collected from different data sources for this thesis. The data sources include Salesforce, interviews with the stakeholders of the case company and internal documents of the company. Data is collected in three rounds based on the research design. Table 1 illustrates the data collection plan for the thesis.

Table 1. Data Collection plan.

	Role	Data Type	Topic	Date	Outcome
Data 1, Current State Analysis					
1	Sales Managers	Interview	Current state of the process	21.2.2024	Strengths and weaknesses of the current state
2	Salesperson	Interview	Current state of the process	7.3.2024	Strengths and weaknesses of the current state
3	Process Owner	Interview	Current state of the process	26.2.2024	Strengths and weaknesses of the current state
4	Global Sales Excellence Manager	Interview	Current state of the process	7.3.2024	Strengths and weaknesses of the current state
6	Global Service Sales Support Specialist	Interview	Current state of the use of Sales Force	29.2.2024	Strengths and weaknesses of the current state
7	Global Operations Manager	Interview	Current State	28.2.2024	Strengths and weaknesses of the current state
8	Local Division Manager	Interview	LSU perspective of current situation	4.3.2024	Strengths and weaknesses of the current state
Data 2, Proposal building					
9	Head of Global Motion Support	Interview	Input for the initial proposal	25.3.2024	Improvement ideas
10	Sales Manager	Interview	Input for the initial proposal	7.3.2024	Improvement ideas
11	Global Sales Excellence Manager	Interview	Input for the initial proposal	2.4.2024	Improvement ideas
12	Local Division Manager	Interview	Input for the initial proposal	3.4.2024	Improvement ideas
Data 3, Validation					
13	Local Division Manager	Interview	Evaluation of initial proposal	12.4.2024	Final improvements

As illustrated in table 1, the first data collection round is for conducting the current state analysis. The first data collection round includes interviews with many different stakeholders relates to the sales opportunity case function process at the case company. Each of the interviews is documented as field notes.

The second data collection round is carried out to build the initial proposal of improvement actions to the process. The second round data collection takes into account stakeholder input for proposal building.

Finally, the third round data is collected to validate the created proposal. the proposal is presented to the Local Division Manager. Based on the feedback from the Local Division Manager, final improvements to the proposal are then made.

The research design, project plan and data collection plan are followed throughout the thesis. The next chapter present the current state analysis of the quotation request process at the case company.

3 Current State Analysis of the Opportunity Case Function Process

This chapter focuses on the current situation of creating sales opportunities with connected Service Supply Unit cases and answering the quotation requests. This section focuses on the current ways Local Service Units request quotations from Service Supply Units. The Main focus of this chapter is on analysing the current state of the Salesforce opportunity case function process. The current state analysis was based on reviewing the internal documents of the company and carrying out interviews with the stakeholders of the company (data 1). The investigated data for conducting the current state analysis includes Salesforce data, process map, emails, discussions and interviews.

The chapter presents the first overview of the stakeholders involved in the process and sales opportunities. Moreover, the updated sales opportunity case function process is presented. Furthermore, chapter 3.1 describes the previously used opportunity communication methods between LSUs and SSU Drives Finland. Chapter 3.4 presents the findings based on the interviews with stakeholders. Finally, chapter 3.5 presents the strengths and weaknesses of the sales opportunity case function process.

3.1 Overview of the Current State Analysis

This section presents the background information needed to understand the opportunity case function process. Chapter 3.1.1 presents briefly the units involved in the sales opportunity process. Moreover 3.1.2 chapter presents what sales opportunities are and what the case company’s sales stages are.

3.1.1 Stakeholders

The Salesforce Sales Opportunity-case function involves many stakeholders. Figure 4 illustrates the units of the case company involved in the process.

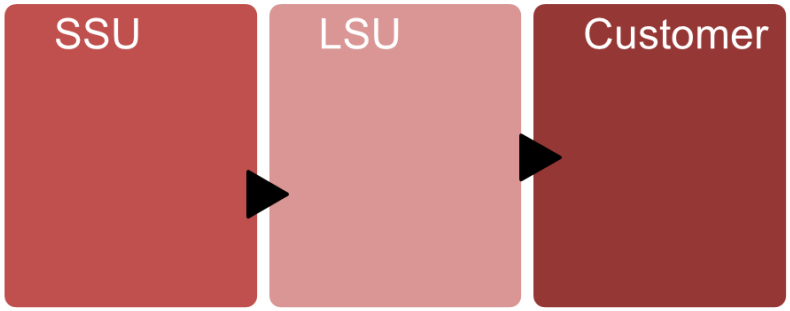

Figure 4. Sales process units.

As illustrated in figure 4, the sales process involves three separate units. Service Supply Units (SSUs) are the backend operators in the sales process at the case company. The case company has five different Service Supply Units: SSU Drives Finland, SSU Motors & Generators Finland, SSU Motors & Generators Sweden, SSU Drives Switzerland and SSU Motors & Generators Italy.

Local Service Units, LSUs are the front-end operators of the sales process. LSUs includes different countries, for example Finland, Poland and India. The LSUs are the operators which communicate to the end customers of the case company. Proactive sales opportunities are generated by LSUs, and they may need sales support from the SSUs during the opportunity case process.

Furthermore, the request for quotation via sales opportunity case has been done by LSU and assigned the case to the correct SSU. After receiving the request, SSU will start the case handling and answer the LSU's request. Then LSU's will continue the sales process to the end customers.

In this thesis, the stakeholders include both LSU employees and SSU employees. The interviewed stakeholder roles can be found in the data collection table.

3.1.2 Overview of Opportunity Management and Sales Stages

Opportunities are sales and pending deals that are being tracked in Salesforce system at the case company. Local Sales Units are responsible for creating the opportunities. For example, LSU Finland creates 100-130 sales opportunities every day. By adding opportunities, the user is building a pipeline which contributes to the sales forecast. Opportunity management is a decision-making process for evaluating, qualifying and prioritizing identified sales pursuits. Moreover, it is managing the sales process execution in order to close a pursuit.

Opportunity management enables sales pipeline management and sales forecasting. Opportunity management presents the overview of the sales stage of the opportunity. The sales stages of the case company, seen in figure 5 below are part of opportunity creation.

Figure 5. ABB Sales Stages (Internal document).

As illustrated in figure 5, ABB Sales Stages includes five different stages which are part of the follow-up of each opportunity. ABB Sales Stages reflect the Opportunity lifecycle.

Prospecting is the first step in ABB Sales Stages. This stage contains identifying and following prospects. Understanding and estimating business potential is part of the prospecting process. The final task in the prospecting phase is to run opportunity screening and qualifying the prospect to pursuit and finally qualify the opportunity. Qualified pursuit is moved to the next lifecycle stage. If the opportunity is disqualified it will be marked as “cancelled” or “lost without ABB bid”.

The next step in the sales process is the opportunity pursuit. This is a stage where the sales strategy is defined, and scope is detailed. The bid decision is done in

this stage. The bid decision includes two choices, “no bid” or entering the “bidding” decision. A positive bid decision is the basis for entering the next “bidding” stage.

After the positive bid decision, the bidding stage starts. The bidding stage includes preparing a quote and submitting the quote to the Customer. During this stage, the LSU usually sends the request for SSU quotation if needed.

The next step in the sales process is the negotiation phase. This stage includes following up with the customer if there is a need for additional support or clarifications.

The last stage of the sales stage is closing. The opportunity is ether won, lost or cancelled depending on the outcome of the negotiation phase. Won means that the customer has decided to buy from the case company. Lost means that the customer has decided to buy from a different source. Cancelled means that the customer has decided not to buy after the bidding phase.

3.2 Updated Opportunity Case Function Process

Starting of 28 February, the case company began an updated process for Global Sales Support for proactive sales. The process map of the updated process can be seen in appendix 1. The goal of the new updated process is greater collaboration between Local Service Units and Service Supply Units in Motion Service. The key part of the new process is to have a case linking for improving LSU-SSU Collaboration. The purpose of the process is to ensure better sales visibility, increased quotation speed, and simplified quotation request process.

In the updated process, Local Service units should follow the standard way in SFDC(Salesforce) when they have a sales opportunity requiring Service Supply unit quotation. The simplified description of the process is presented in figure 6.

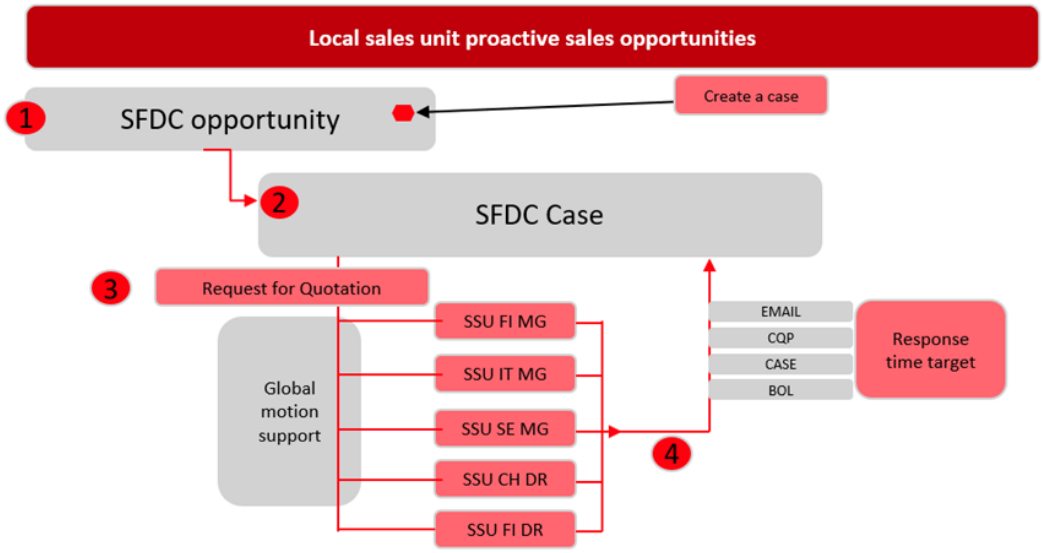

Figure 6. Opportunity case function process (Internal document.)

As seen in figure 6, Local Sales Unit will create a Salesforce case from an opportunity, if they need an SSU quote. The case should be created if the sales opportunity value is over 10 000 USD. Furthermore, the request for quotation via the case has been done by LSU and assigned the case to the correct SSU. After receiving the quotation, the case handling starts from the SSU.

The new process includes that LSUs can choose the relevant SSU from the case drop-down list and assign the case to the Global Motion Support queue in Salesforce. Furthermore, in the updated process if multiple SSUs are involved, different cases can be created from the opportunity.

As seen in figure 6, SSU answers to the quotation request by using different methods. SSU answers to the created quotation by using email, CQP, BOL or using the case function in Salesforce. After SSU have finished handling the case, they close the case.

LSU will then proceed according to the sales stages of the company.
The created opportunity case is the SSU connection point. Then, SSU can view the data of SSU related to cases with sales opportunities on Salesforce.

The updated process started in different phases. All of the Service Supply Units were held one launch meeting info 19 February 2024.

The case company has over 60 Local Service Unit countries. Different Local Service Unit countries are informed of the process in different phases. Local Service Unit United States was the first LSU country to start the opportunity case function process. United States is the biggest LSU country in the case company. On 18 March 2024, there was a start up meeting of the case function process with LSU India. India is the third highest LSU country in the case company Moreover, on 22 March 2024 there was a start-up meeting with LSU Finland. After the start up sessions all of the above mentioned LSU countries should be using the new process. The rest of the LSU countries should be on board with the new process by the end of June.

Chapters 3.2.2 and 3.2.3 present the opportunity case function steps in Salesforce.

3.2.1 Opportunities in Salesforce

Local Sales Unit employees' work includes creating sales opportunities in salesforce. The opportunity creation takes around 15 minutes.

In opportunity record page, the key fields that must be completed for the opportunity are opportunity name, account customer, ABB location, opportunity value and expected award date. The key fields in the opportunity pursuit phase are offering primary product group, offering primary business line, RFQ received date, requested bid submission date and account-end user.

Service Categories are stable data elements defining an offering scope with a product, system and service responsibility within a Service Product Group. Service categories are replacement, maintenance, training, spares and consumables, technical support and repairs, engineering and consulting,

advanced services, extensions, upgrades and retrofits, end of life services, service agreements and installation and commissioning. Service category/Product type comes from an opportunity information. That field is needed only when going in the next stage in the ABB sales stages. That information is not needed in the prospecting phase of an opportunity. In the Opportunity pursuit stage the service category field is mandatory.

3.2.2 Case Creation in Salesforce

According to the new updated process, LSU will create a salesforce case from an opportunity. The case creation-window in Salesforce can be seen in figure 7.

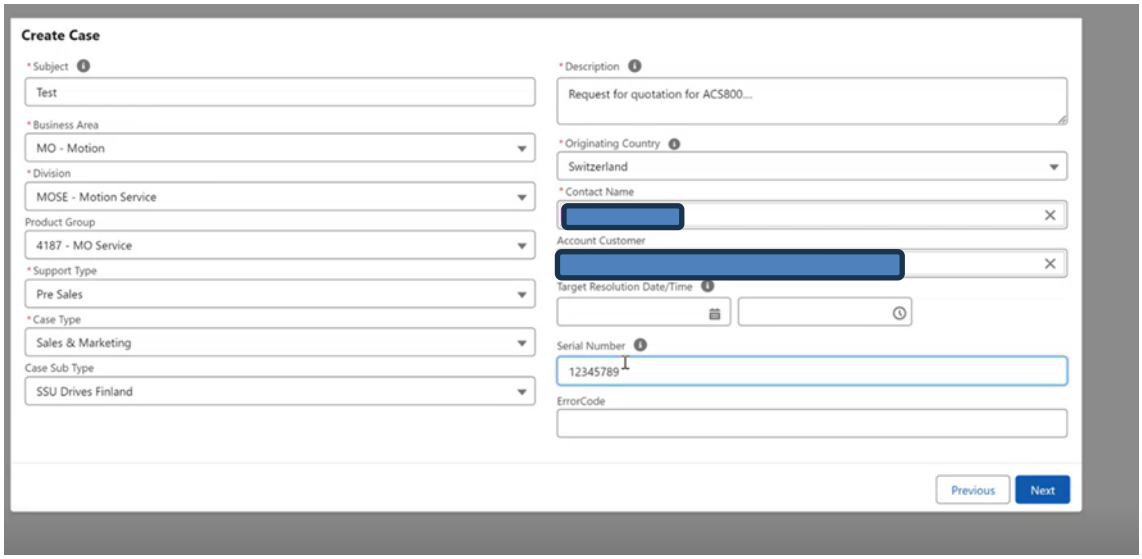

Figure 7. LSU view, when creating a case from an opportunity in Salesforce.

As seen in figure 7, the mandatory fields that LSU has to fill when creating a case include subject, business are, division, support type, case type, description, originating country and contact name.

The subject field comes from the opportunity name. Business Area is always automatically Motion and division is Motion Service. The support type is pre sales when the case is from a sales opportunity. Case type is sales and marketing. In the description field, LSU will fill the required information. The contact's name is supposed to be the person who is creating the case from an opportunity.

When support is needed by SSUS, LSUs can choose the relevant SSU from the case Sub Type drop-down list. the case sub type field means the relevant SSU to handle the case. When creating the case from an opportunity, LSU can choose SSU Drives Finland, SSU Motors and Generators Finland, Motors & Generators Sweden, SSU Drives Switzerland and SSU Motors & Generators Italy. After creating the case, the case goes to the Global Motion Support queue in Salesforce. After creating the case, LSU should make sure that the case owner is filled as GLO-MO/Global Motion Support thus the case goes to the right queue.

However, if the person filling the case information does not know which SSU to select, the sub type can be left empty, and the case goes still to the queue. After the LSU has created the case, the case appears in the Global Motion Support queue, seen in figure 8.

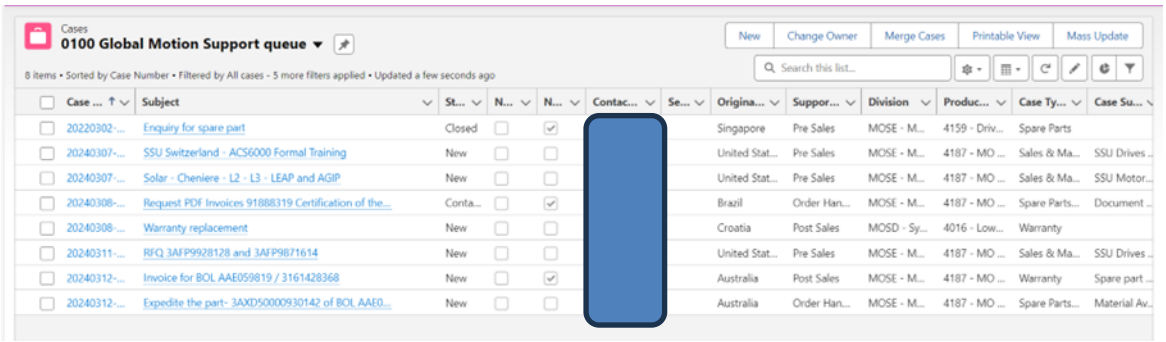

Figure 8. Global Motion Support queue in Salesforce.

The Global Motion Support queue, seen in figure 8 is located in the cases tab in Salesforce. This queue includes the cases sent by Local Sales Units. The columns shown in the cases are: Case number, subject, status, new email, contact name, severity, originating country, division, product group, case type, case sub type and description. The data for the columns comes from the case creation part.

When the case handling starts from the SSUs after receiving the case to the Global Motion Support queue, the case has a different status. The case can be

in the following stages: contacted, under investigation, root cause found, solution provided, solution implemented, pending customer response and finally closed.

3.2.3 Service Supply Units views for cases in Salesforce

After starting the new case creation process it should enable SSUs to have data regarding the opportunities with SSU connected cases.

Furthermore, more Salesforce reports have been created regarding opportunity case function. The created reports are called: SSU report: Opportunities commit, SSU report: Opportunities with cases and won, SSU report: Opportunities with cases and lost and SSU report: Opportunities commit and won. Figure 9 below presents the Salesforce report regarding opportunities with connected cases.

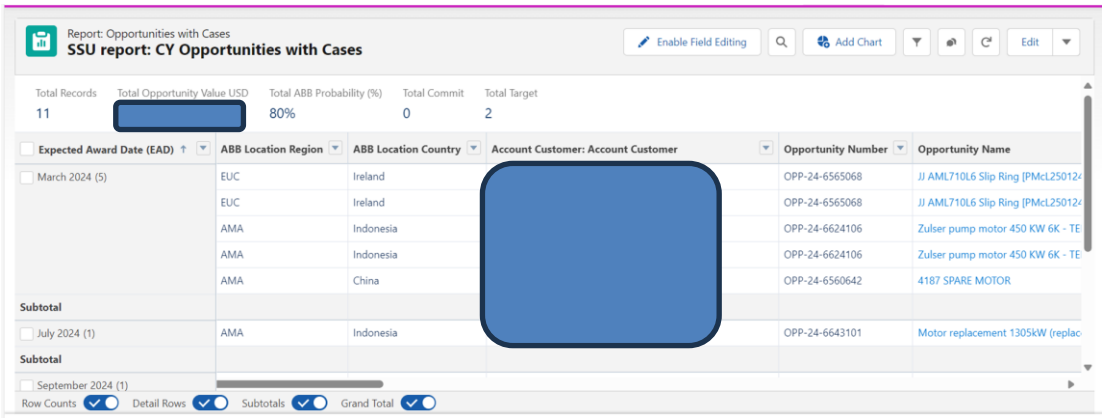

Figure 9. SSU report: CY Opportunities with cases.

Figure 9 presents the SSU report: Opportunities with cases, which includes the information that should be important for both LSUs and SSUs. The report contains many fields. This report is linked to the dashboard of End 2 End Connection LSU-SSU (figure 10). Stakeholders can create their own dashboards based on the data of the reports.

Figure 10. SFDC dashboard: End to end connection SSU-LSU.

Figure 10 illustrates End to end connection SSU-LSU Salesforce Dashboard. The dashboard has been created for the new sales opportunity creation process. As for now the dashboard includes information regarding value of opportunities with SSU cases, number of opportunities with SSU cases, opportunities with SSU connected cases, value of committed opportunities, opportunities based on the location country, won opportunities with SSU cases and sum of opportunity value by opportunity service category. ABB Location - Bidding Unit refers to the Sales, Service, Project Execution or Manufacturing unit (Business Activity Location - BAL) that will lead the Opportunity in terms of final bid preparation towards the Customer and that will book the order. The dashboard can be filtered by the SSU name, service category, case status and MOSE region.

With the new process the response time KPI is possible to measure. When the case has been opened by the relevant Service Supply Unit, a timer will start, and the timer will close when the case has been handled and closed by the SSU. The response time KPI enables to review how long SSUs take time to handle the cases.

3.3 Previously Used Quotation Request Methods between Local Service Units and Service Supply Units

Before starting to use this new process, Service Supply Units received the requests from LSUs mainly by an email and business online-tool. Each Service Supply Unit team had their own methods of answering the quotation request.

Based on the interviews, SSU Drives Finland has been constantly using Salesforce and its email link approach. The amounts of cases are currently growing each month. SSU Drives Finland has 800 cases monthly. They have been using their own sales products support email, where LSU's send the requests and the queue is linked to salesforce case function. 80 % of cases come by an email.

Currently part time employees allocate the cases to case handlers. SSU Drives Finland view the reports and email data to see, if one person has many unanswered cases, they will be allocated to another employee.

As of now SSU Drives FI check all the cases that come to the Global Motion support queue. They check all of the cases since the cases can be categorized wrong. They manually open all the cases and check them. Based on the interviews with sales managers at SSU Drives Finland, they usually know based on the subject header if the case is part of their team responsibility or another SSU.

The old way of using the Salesforce platform when opportunities required SSU involvement was to enter correct SSU name under ABB Location-Source Location field, in the opportunity information. This field can be seen in figure 11.

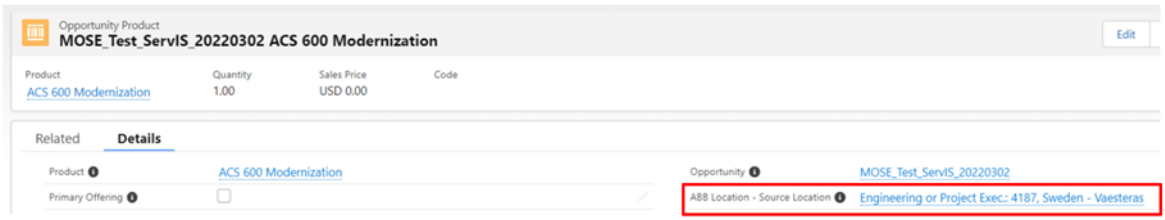

Figure 11. Source location field in the opportunity.

As seen in figure 11, the source location field is not mandatory to fill for LSUs. From the LSUs perspective in the old method, they have had to remember all the different SSUs and their teams to send the request to the right team. And for now, the two SSU's located in Finland use the same location name, only the address information is different. Therefore, data including Source location was missing and not available to SSUs. Therefore, SSUs were not available to see the opportunity data involving SSU quotations.

Business Online is also another tool that LSUs and SSUs have been using to make a request. Currently in business online it creates a mail to sales product support email queue.

SSU Drives Finland monitors over 50 000 USD cases with more attention. As for now, SSU Drives Finland may not close the case immediately since if the case needs to be edited later, it is easier to keep it open. Before it was not possible to edit the case afterwards. In their own metrics, the case response time metric closes when a case is closed or solution provided.

The methods in different SSU countries vary. When SSU Drives Finland has been using cases in Salesforce for years, Sweden and Italy have not. Sweden has been using emails and in some cases Salesforce. However, Italy has not been using the salesforce source location field at all. Furthermore, SSU Motors and Generators Finland also has been working differently that other SSU Drives Finland teams. These different methods have been used because the products and service lines are different in each SSUs.

3.4 Analysis of the Current Situation

Old Methods for Requesting Quotations

According to many stakeholders, the source location field in the previous salesforce opportunity creation was not good. It has been a time wasting and effort taking method. It has been unmotivating for LSUs to fill the needed SSU Source Location to Salesforce, when creating an opportunity since it does not benefit LSU at all. Furthermore, the filling of the right SSU has been unclear to many LSU users. Therefore, LSU has left the SSU part empty in the salesforce opportunity. That has led to not having data and metrics regarding the opportunity information between LSU-SSU. Therefore, there has not been evidence concerning how big part has the SSU have been involved in the opportunity and have the quotations accepted before contacting the end customer.

One key observation is that SSU Finland are used to use salesforce case function even before the start of the new opportunity case linking process. Based on the interview with the Sales Manager, the change for SSU Drives Finland is that the received email information would change into received Salesforce case. Based on the interviews, all Sales Managers predict that overall visibility of the opportunities will be better with the updated process. However, SSU Drives Finland believes it does not impact their work much. They have already been using Salesforce cases for handling the request from LSUs.

One weakness of using the previous email function is that it causes spam mail and that mail roll all around. The benefit of using email is that, it is simple and cheap. However, the stakeholders' opinion of using email for now for asking quotations vary. Other employees want to get rid of email since it can be confusing and there is not much data collection possibility. There would be more data available if SSUs are using Salesforce instead of email. According to another sales manager the email function has been easy to use.

Visibility

Furthermore, before there has not been a link between the opportunity and quotation for it between LSU-SSU. Overall, the problem has been that after SSU has answered the request by whatever method, the view to the LSU operations has been lost. SSUs have not been aware of the state of the opportunities and their value. According to Local Division Manager, the view to sales opportunity data from SSUs have been only 7%. Forecasting future opportunities has been a challenge without having the necessary data regarding the opportunities. Furthermore, it has been difficult to improve SSU operations if they do not know how well or bad they have worked for LSUs.

Sales Managers of SSU Drives Finland were welcoming of the process and believe the visibility of the opportunities will improve. Sales Mangers want to have a view to big opportunities information. Furthermore, having an ability to view trends regarding opportunities is what the sales managers wish for the new process. Furthermore, SSU Finland Sales Manager would also want to know which product types the cases involve.

Simplicity

LSUs are really welcoming this new process. Based on the meeting with LSU US, they have been wanting and waiting for this one type of standardized way of asking for quotations and support from SSUs. Their feedback was that making it only one queue, it takes away confusion and makes it easier and simpler. Before, the LSU sales managers have had to remember much information regarding SSU involvement in their opportunities. LSU US also believes that the new process is straightforward.

Data

LSUs have not been aware of the response time for making the quotation by SSU. Before using this new process, communication concerning the status of the

request has been done via email or calling. According to Local Division Manager it has taken an effort and time by LSUs to answer the calls and check request by SSUs. It has been a priority for LSUs to be more in contact with the customers than using time for reporting to SSUs.

According to local division manager, before there was no evidence to show how long the cases have been processed. This caused problems for Local Service Units as they need to have quotations thus they can continue the sales process with the end customers. Now the local service units can see the time that SSUs usually take to respond and therefore plan their sales better. An Improvement meeting can also be arranged as there is data to show how the LSU-SSU connection works.

According to Local Division Manager the strengths of the process are transparency and reducing reporting for LSUs. Furthermore, according to Local Division Manager, the dependence on specific employee will be reduced. That means that if salesperson is on a holiday, someone else can still see the status of the case and handle it.

Different Methods in Service Supply Units

The shared Global Motion Support queue can be seen as both a strength and a weakness. The more shared queues, the more people will come and change the categories, according to the Sales Manager.

A challenge of the updated process can be with the different needs of Service Supply Units. SSU Drives Finland has different methods of handling the request form LSUs than SSU Finland Motors and Generators.

Moreover, there were questions coming from Service Supply Units Sweden regarding the new process. Sweden was questioning why the opportunity case creation process cannot be driven by product type or transfer price when creating a case from an opportunity. In Sweden and in Finland the SSU involves different

teams according to the product type. For example, replacement is managed by a sales team and spare parts-product type is managed by spare parts team. With this new process all the SSU Sweden cases go to the one Global Motion support queue without sorting which team is responsible. There is no sub filtering for product types. According to the Sweden employee this can lead to that SSUs will start to create their own processes to tag product types. This same idea of having different teams' cases in the same queue was not raised as a problem by interviewing sales managers of SSU Drives Finland.

> "If 20 people from SSU Sweden want something different it is not same that thousands of people across the world will do that"- Global Sales Excellence Manage

This feedback was responded by Global Sales Excellence Manager that the process has to be fast, easy and simply for LSUs. If product types and different teams for SSUs should be all filtered, the LSU user would have to remember numerous instructions and guidelines. Therefore, that would cause complexity. The communication between LSU-SSU has to be very clear and same for every unit. Otherwise, it is too complicated and does not change anything compared to the old methods of handling the requests. According to Global Sales Excellence Manager all opportunities need to have Service Product categories mentioned at the header level which can be seen in the reports and can be used as a filter in the dashboard.

Based on the interview with Global Sales Excellence Manager the product, value, team information is only wanted to be seen in SSU perspective. For LSUs it is not worth it filling in the case information

The process owner also pointed out that a potential weakness of the process is people's resistance to change and not having one authority to take the charge of the process. This can lead to previously mentioned own methods for SSUs. It is important that the SSUs start to handle the cases according to the process,

otherwise LSU will stop sending the request by the case function if it does not work and does not benefit the LSUs.

According to one stakeholder, a number of complaints have been received when implementing new tools based on his previous experiences. Furthermore, it can be a challenge to further develop the salesforce case function and its capabilities since salesforce development is expensive and challenging for 27 000 salesforce users. It can take half a year or even longer for a small development.

Awareness of the Process

Based on the meeting with Local Service Unit United States, people were asking if the SSUs are aware of this new process and will respond to LSUs request according to process guidelines. The Global Sales Excellence Manager, who is responsible for informing all the participants involved in the process said that SSUs have had a meeting and are aware. Based on the interviews regarding this thesis, at least in the middle of March, many SSUs were not aware as there have been only one launch meeting and document regarding the sales opportunity case function. Based on the meeting with the Sales Managers, they had not been aware of the created dashboards and reports for the new process.

Based on the interviews, not all stakeholders were aware if the new process has started and how it works. According to a Salesperson, Motors and Generators Finland still does not use the case function at Salesforce.

> “I don’t know how the case is being created by the LSU”-Sales Manager

> “As for now I don’t see the benefits for SSUs, but I may also not understand everything.”-Salesperson

> “ People don’t know what has been decided and even managers don’t know.” -Salesperson

There has been one teams meeting and recording of the meeting for Microsoft Teams. Furthermore, the problem has been that the launch meeting with the SSUs was held in February, weeks and even month before the LSUs started to use the process. Based on the interviews, the Sales Manager of SSU Drives Finland did not remember the created Microsoft Powerpoint presentation of the process. After that, it has been the responsibility of the end users to contact the process owners.

The information was shared last time on 8 March 2024 on the Microsoft Teams channel. That was just when LSU United Stated was starting to create cases according to the process. This means that, there has not been any information or updates for SSU regarding the joining the LSU India and Finland at the end of March. There has been only one SSU Sweden employee asking specific questions regarding the SSU involment. To conclude, the Teams channel for SSUs has been an ineffective communication channel. No interaction or information sharing. SSUs has been left alone to handle the process. This could especially effect SSU Sweden, Switzerland and Italy since they have not been using the Salesforce case function before.

Salesforce data analysis of the current situation

Based on the Salesforce data, as of 14 March 2024 there were only a few opportunities with connected SSU cases reported according to the sales opportunity case function process. This result indicates that most of the SSUs and LSUs still use the old methods. Only LSU US was informed by this point how to create the case in Salesforce. US has been able to create two cases according to the process. One case was connected to the SSU Motors and Generators Italy and one was to SSU Drives Switzerland. As of now, there are not any opportunity cases linked to the SSU Drives Finland.

3.5 Summary of Strengths and Weaknesses from Current State Analysis

Based on the investigation of the current state of the opportunity case function process, four strengths and four weaknesses were identified. The identified strengths and weaknesses based on interviewing stakeholders and investigating company's documents are presented in table 2.

Table 2. Strengths and weaknesses of opportunity case function.

Strengths	**Weaknesses**
Standardized process	Service Supply Units are not aware of the process
Simplicity	Resistance to change from Service Supply Units
Visibility	Lack of communication regarding the change process
Possibilities for better material forecasting	Management not having clear plan for the roll-out phase of the process

As seen in table 2, the strengths of the process are that it is standardized and simple. The standardized process is a key strength thus the quotation request methods should be all the same for different Service Supply Unit countries.

Therefore, simplicity is one of the strengths, since only one tool is needed to ask SSUs support, and the process tries to minimize the information LSUs have to fill when making the request. Compared to the old source location-field the new Sub type-field is much easier to fill and understand for LSUs.

As seen in table 2, one key strength is improved process visibility. The process enables better transparency and end-to end sales visibility from SSU to LSU. This means more visibility to see how cases are being processed. Moreover, it means better understanding for SSUs of the opportunities. The data regarding opportunities with connected SSU cases will benefit SSUs.

The current state analysis identified a weakness regarding the awareness of the process in the Service Supply Units. Based on the interviews, many stakeholders were not aware how the new process affects their work. Moreover, Service Supply Units Sales Managers were also unaware of the created dashboards and reports created for the process.

The service supply units´ resistance to change can be one weakness regarding the opportunity case function. Different units are used to work in their own way and may not feel that the new process benefits them. According to the interviews, the Service Supply Units may not see how the process benefit the main sales process from Local Service Units to end customers, rather are only focused on how they have to change their own work. Therefore, the Service Supply Units want to filter the cases and change the process to suit their operations.

One challenge according to Global Sales Excellence Manager is that the service category information placement is not clear to SSUs. As for now it is possible that a person from the SSU is looking for the service category information from the case information in Salesforce instead of looking for the opportunity information. In the opportunity case reports and in the dashboards the service category can be empty since the sales stage is still in the pursuit phase. In opportunity pursuit stage, the service category becomes mandatory for LSU to fill.

Another weakness is that people are not following all the steps in the process. Global Sales Excellence Manager raised a possible challenge that people are not using the right case owner field in Salesforce. This means that the case owner is someone by individual name and not global motion support. Therefore, the case is not shown in the relevant SSU queue in Salesforce.

The strengths of the process are that it may benefit operations and making material forecasts. According to the Operations Manager, as for now there has not been a view to data concerning opportunities. As of now, forecasting is

looking back and comparing material information to last year. The Operations Manager is hopeful that the necessary information could be coming from Salesforce. For operations information regarding service categories, product types and expected delivery dates are important. Especially the forecasting regarding retrofits would be really beneficial to operations. As for now, it is really difficult to inform the supplier of any predictions. That can cause long delivery times for the end customers.

The weaknesses identified in the current state analysis were Service Supply Units resistance to change, SSUs not being aware of the process and lack of clear plan and communication for the roll out phase of the process.

The scope for this thesis requested by the case company was to focus on the SSU Drives Finland and not all SSUs. However, since the process is still at the beginning and the amount of connected cases are low, it was agreed with the case company that the recommendations and especially data analysis for the proposal could include all the Service Supply Units involved in the opportunity case function process.

This completes the current state analysis. The literature research is conducted in the next chapter. Future investigation from literature review is done for providing improvement ideas for the chosen weaknesses.

4 Literature Research on Change Management and Trend Analysis

Chapter 4 presents the literature review based on the identified weaknesses from the current state analysis. The sales opportunity case function weaknesses were described in chapter 3.

The literature review includes four different sections. These sections are change management, best practices for rolling-out a Salesforce project, improving communication and awareness during change process and trend analysis. The trend analysis is selected as part of the literature review as it is s requested element for proposal building from the thesis supervisor at the case company. The theory of trend analysis provides the necessary information for making the trend analysis in the proposal building phase.

4.1 Change Management

Change can be based on internal development process. (Lauer 2021:6). Change projects are implemented usually in fast cycle in companies and can be implementation of a new business strategy, outsourcing of operations, change project related to organizational culture, and processes. The change processes objectives usually are business development and improving the company's competitiveness. There are a great deal of expectations regarding the change and usually the project does not always produce the desired results. The companies would benefit more from the change processes if they had good management. (Pirinen 2023.)

Figure 12 presents a model of different phases of change processes.

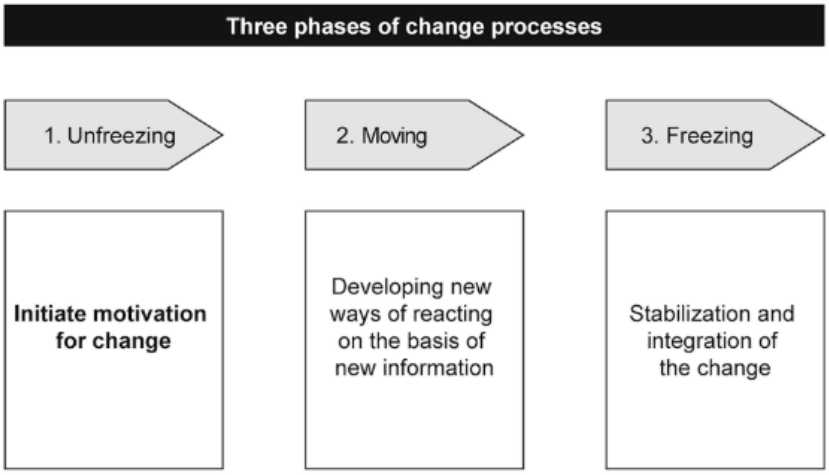

Figure 12 illustrates a change model. (Lauer 2021:66)

As illustrated in figure 12, the phases of a change process presented by Lauer (2021:66) includes three main steps. The model includes three main parts, which are unfreezing, changing and refreezing. (Chowdhury & Shil 2022:29-30.)

Good change management includes an unfreezing part, which includes reducing ways that uphold the current ways of working. Unfreezing is a key part that the organisation is ready for the change, since it helps people to be open minded for new way of doing. (Chowdhury & Shil 2022:30.) Most used procedure for initiating change is to reduce the retarding forces. This could also be achieved by strengthening the accelerating forces. (Lauer 2021:66)

The changing part involves employees to learn and adapt to the changed procedures. (Chowdhury & Shil 2022:30). According to Lauer (2021), this step is called moving phase and it describes the actual change work.

Finally, during refreezing, the changes are stabilized by using policies, norms and structures. That leads to that the old working principles of employees are prevented and resistance can be reduced. (Chowdhury & Shil 2022:30.) Lauer (2021: 66-67) points out that a relapse to old ways can be observed, after 9-12 months since starting the change project. By using the refreshing activities, the relapsing can be fixed. (Lauer 2021:66-67.)

A change process can usually fail. Figure 13 presents the most common causes for a failed change process based on the research results by Lauer (2021:46).

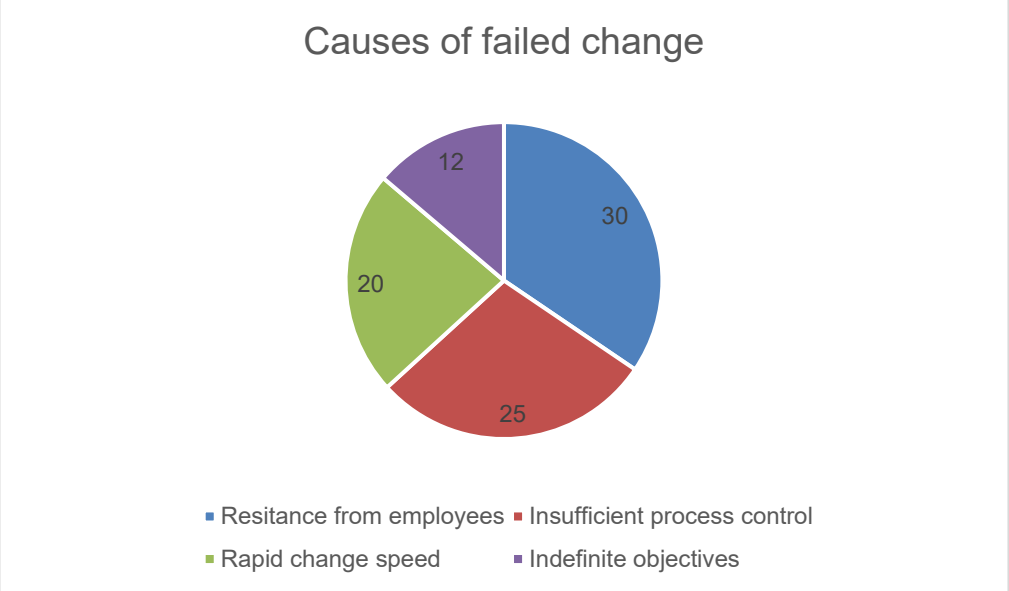

Figure 13. Causes of unsuccessful change. (Lauer 2021: 46)

As seen in figure 13, the resistance from the employees has the biggest effect on failed change process (30%) and the second largest impact is from the insufficient process control (25%). The methods for dealing with resisting employees is described in section 4.1.2. Moreover, information regarding monitoring the Salesforce process and planning the successful roll-out for a Salesforce project is described in chapter 4.2.

4.1.1 Dealing with denial and passive employees

A change project take away employees´ effort and time (Pirinen 2023:380). Therefore, employees can have different reactions towards change. It is easier to lead and handle change process when different types of employees are identified. Employee types can be in denial and passive. (Pirinen 2023:351-352.) In denial employees view the change as a threat personally and therefore can deny the change. These views can be coming from previous negative

experiences during a change process. Usually, the denial can focus on the problems and brings it up to others. For handling in denial employees, the supervisor should repeat the main messages of the change. The manager should not be arguing with the employees since there could be endless discussion of the topic. The expectations of the employee during the change and the guidelines working in the organisation should be discussed together with the employee. (Pirinen 2023:351-353).

Passive persons during the change can withdraw during change. They do not have the willingness to change. Staying in the comfort zone regarding their own work is important for passive employees. This is shown as uninterest in learning the new guidelines regarding the change. Instead, they want to work following the old ways. These reactions can be caused as well by bad experiences or annoyance of constant change in the workplace. Furthermore, if they believe the change does not benefit them or is useful. Usually, passive persons are not resistant in attitude, instead they do not have the enthusiasm to participate during the change. (Pirinen 2023: 358.)

For handling passive types of employees, the manager should use motivating and activating ways. This usually involves meeting with the employees and discussing the work tasks and view from the employee. A key aspect for the management is to ensure that the employees have the competence to perform the work. This can involve a plan where the employees work will be reviewed weekly. Learning for the employees during the change process may take time and it is necessary to present the goals for the employees. Positive feedback should be provided to boost motivation for the change. (Pirinen 2023:357-360.)

4.1.2 Dealing with Resistance of Change

In an organisation, the employees can have a psychological negative reaction towards changes. This means that employees react passively to changes of tasks and unconvinced of the modifications to processes. An offending attitude impacts negatively to other employees and makes the implementation of improvement

actions difficult to all participants. (Becker et al. 2003:35.) Supporting and encouraging employees are important since their resistance and openness to change impact the outcome of the change process (Chowdhury & Shil 2022:30).

Reasons for resistance to change can be lack of understanding, unclear direction, lack of influence opportunities, poor management, uncertainty, fear of unknown and bad experiences from the previous change (Pirinen 2023:167).

Moreover, critical success factors for navigating change are strong leadership and that the management sets clear deadlines, milestones and a realistic project plan and detailed project controlling. If the leaders are not involved and taking responsibility, the resistant participants can influence majority of people. (Becker et al 2003:36-37.)

Becker et al. (2003:35) explains that informative and individual conversation has a good impact on managing resistant employees. The conversations need to include empathy towards the resistant employees. (Becker et al. 2003:35.)

4.2 Good Practises for Rolling out of Salesforce Project

When companies roll out their Salesforce project it affects the users as it changes their work. The objective of the companies' CRM system should be that the employees embrace and appreciate it. It is key to have a simple plan for managing the change. It can be updated, based on the phases of the roll-out. Jorgensen (2023) presents the common issues to avoid in the roll-out phase of Salesforce project and provides tips how to mitigate them.

Change management, training and effective communication are crucial focus areas during the implementation of a Salesforce project. Companies should have documented training material since if the documentation is not adequate, the users may have difficulties to understand the Salesforce and the steps. (Jorgensen 2023.)

For the roll out-plan Jorgensen (2023) suggests that the companies should plan the user groups for the roll-out phase by for example countries. The roll-outs should increase over time and use communication plan. For each roll-out wave companies should have a phased roll-out plan, communications plan and management plan.

Jorgensen indicates that the user training for the process should be in person. It is crucial that the employees completely new to the process should be provided training. (Jorgensen 2023.)

For monitoring the use of the new Salesforce process, companies should (Jorgensen 2023.):

- Construct dashboards and reports for record the usage of Salesforce.
- Sent out surveys.
- Have interviews for making improvements based on the user feedback.
- Evaluate how the process is performing against the old way and analyse the trending towards it.

For monitoring the usage in Salesforce it is key to track the effectiveness by investigating the number of created opportunities or cases per timeframe. Companies should define what metrics are key for the company's salesforce. (Jorgensen 2023.)

Sending out surveys to the end users is a good method for embracing the salesforce use. For a good outcome, surveys should be sent out weekly at the beginning of the roll out and then once a month. The surveys should include questions of what was good and not good in the solution and if there is any improvement need. Furthermore, the end of the survey could involve a part indicating how users can get help. (Jorgensen 2023.)

According to Jorgensen (2023), one usual challenge in Salesforce change management is that users do not use the salesforce system as designed. The users can use alternative ways due to the insufficient training and not properly communicated business procedures.

The answer to this challenge is to request feedback and making modifications to the content, training plan and delivery. Supporting users by training them is a key mitigation way. (Jorgensen 2023.)

4.3 Improving Communication and Employee Awareness during Change Process

Munagavalasa (2022) presents the key elements to plan good user communication regarding the changed procedures. According to Munagavalasa (2022) many Salesforce projects fail since the communication has not been effective.

The change will be easier when it is communicated well to participants. Employees should be available to receive information from the change at the beginning and prepare for it. It is the managers' responsibility to inform the change decisions as early as possible. Guidance and support are needed throughout the change process. (Pirinen 2023.)

At the beginning of the change, personal discussion between management and employees should include what the change means to employee involved in the meeting. Furthermore, the management should provide information, how the change will affect the employees' work and what are the next steps for the change process. What are the benefits from the change and what is expected from the employee should be discussed with the employees. During the change process there should be discussion throughout the change process. This discussion could involve,defining clear steps and establishing whether there are questions or more information or training required. (Pirinen 2023:114.)

According to Munagavalasa (2022) getting feedback is crucial during the Salesforce process. The feedback communication should involve speaking, listening, and creating channels to communicate. In these channels, the users can express their opinions, concerns and suggestions. Gathering feedback enables the leaders to identify areas for improvement. (Munagavalasa 2022.)

Every communication channel should follow a pattern. It is key that the communication is consistent and targeted to the right users. The shared messages should all be the same. (Munagavalasa 2022.)

Communication channels can be video, email or Microsoft Teams. Munagavalasa (2022) points out that emails should be sent weekly to large amounts of users. Email provides a way to send key information within desired time frames.

Furthermore, the collaboration site for example Microsoft Teams can be used to share information of the project and provide a way to have interactions with the end users. By using the collaboration site, managers can post updates to employees and allow employees to interact. (Munagavalasa 2022.)

Champions of communication is one method of increasing communication and good implementation of the Salesforce project. Champions are employees who understand the process and want to improve it. People can trust them as they are fellow employees. Champions should be identified and onboarded as soon as possible in the change process. (Munagavalasa 2022.)

4.4 Existing Knowledge for Producing Trend Line Analysis

According to Permatasari et al. (2022), the trend line analysis is a suitable method for forecasting the future status of the analysed data. The trend line analysis analyses the collected data and identifies the data movement.

Forecasting is based on the quantitative or qualitative approach. Historic data is used as a source to make quantitative forecasting. The objective of forecasting is to predict the demand. (Nadler & Kros 2007:1-2.)

To see a trend associated with the data, different methods can be used in Microsoft Excel. One method of doing the analysis is to use the trend function in Excel. In this method, the data points are inputted into the formula. A forecast can be made from analysing the existing data on dependent and independent variables. The trend analysis creates a way to investigate how data is related and provide forecasts. (Nadler & Kros 2007:13-14.)

Another method for creating a forecast from the data is using the Microsoft Excel forecast function. The forecast function uses the exponential smoothing method that Nadler & Kros (2007) described doing manually. However, this Excel function uses an algorithm to calculate the future values. Monthly or different timelines are requested for this function to work. The function needs information regarding the desired predict value point, historical values, and timeline. The values are the information that is used for forecasting the desired next values. (Rahardja 2021:69-71.)

4.5 Conceptual Framework

The results of the current state analysis indicated the weaknesses of the opportunity case function process at the case company. Based on the results of the Current State analysis, relevant theory regarding change management, best practices for rolling-out a Salesforce project, improving communication and awareness during change process and trend analysis were researched. Table 3 illustrates the conceptual framework. The framework uses all the main topics from the literature review. The conceptual framework is used for building the proposal for improving the process.

Table 3. Conceptual Framework for improving opportunity case function process.

Key findings from CSA	Related literature	Use of the literature
SSUs employee's resistance to change	4.1.1 Dealing with in denial and passive employees 4.1.2 Dealing with resistance of change	To understand how to manage resistant and passive employees
SSUs not aware of the process	4.3 Improving communication and employee awareness during change process	To explore what are best ways to increase awareness during change process
Lack of communication regarding the change process	4.3. Improving communication and employee awareness during change process	To investigate best ways to communicate the change process to employees
Not planned roll-out phase for the project	4.2 Good practises for rolling out a Salesforce project	To investigate how to properly roll-out a Salesforce project
	4.4 Existing knowledge for producing trend line analysis	To explore ways to produce trend analysis

Table 3 illustrates the four main categories based on the weaknesses of the current state analysis. The first category was Service Supply Units resistance to change, which includes best practices to manage the employees' resistance to change. The second category was lack of SSUs awareness of the process, which presents ideas for good communication methods in Salesforce projects for increasing awareness of the end users. Finally, the fourth category, roll out of the Salesforce project presents the key elements for having an effective and successful roll-out for a Salesforce project. The final part, Trend analysis and forecast presents ways of how trend analysis and data forecast can be made in Microsoft Excel.

The literature research on change management and trend analysis provided the needed conceptual framework for the thesis. The conceptual framework is used in the proposal building phase in chapter 5. The chapter presents the proposal for improving the opportunity case function process.

5 Building the Proposal for Improving the Opportunity Case Function Process

This chapter presents the initial proposal for improving the sales opportunity case function process. The focus area for the proposal is the identified weaknesses of the process from Current State Analysis. The proposal has been made based on the relevant literature, analysing salesforce data and carrying out interviews with stakeholders. The relevant literature based on the weaknesses of the current state analysis were researched in order to find suggestions for the proposal. Furthermore, in addition to the relevant literature, the initial proposal was built by interviewing stakeholders from the case company (Data 2) and analysing the Salesforce data regarding the opportunity case function process.

5.1 Overview

The outcome of the thesis is a list of recommendations in order to improve the opportunity case function process. The list includes recommendations of managerial activities for improving the process as well as trend analysis and forecast.

The desired outcome of the proposal included also trend analysis of the case opportunity data from Salesforce. The Local Division Manager wanted to have information of how many cases have been created according to the process by week and month and how it develops over time. The data analysis also took into account the different phases of the process implementation such as when different LSU countries have been coming onboard for the process.

5.2 Initial Proposal

The initial proposal presents the recommended actions to the Salesforce opportunity case process for ABB Oy. The recommendations are based on the analysis of the data of the first three months of the opportunity case function

process and the proposal suggestions from the stakeholders and relevant literature.

The initial proposal includes recommendations for improving the weaknesses identified in the Current State Analysis. Furthermore, the proposal includes trend line analysis of the data of cases linked to opportunities. The trend line analysis and forecast were requested by the Thesis supervisor of the case company. According to the Thesis Supervisor, the data analysis and forecast are the main outcome of this thesis and benefit the case company. Based on the created cases according to the process guidelines, a forecast was created to predict the case amounts for next months.

5.2.1 Findings from Data Analysis

One part of the initial outcome of this thesis was an analysis of the Opportunity Case function process. This chapter presents the findings of the analysis of the Sales Opportunity case function process. The analysis was executed by investigating the Salesforce opportunity, case and dashboard data.

In this thesis, a report was created with connected SSU cases from an opportunity based on the report of SSU cases. Based on the created report, as of 8 April 2024, there were 22 created opportunities with connected SSU cases. This means, the number of created cases according to the new sales opportunity case function process. Figure 14 presents the data of the cases created according to the process.

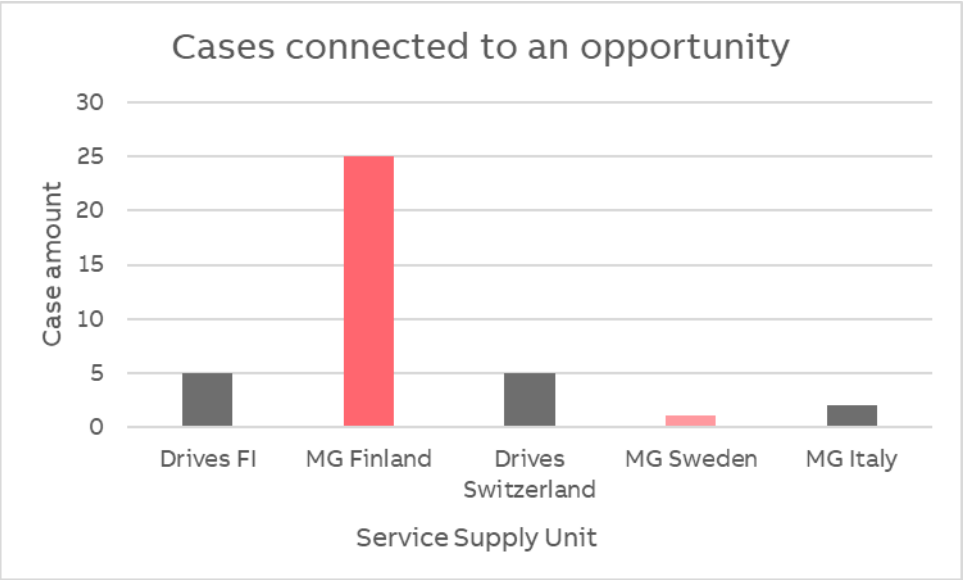

Figure 14. Number of cases linked to an opportunity according to the process.

As seen in figure 14, the biggest SSU unit has been SSU Motors & Generators Finland with 25 connected cases. As of 18.4 there were 38 created cases according to the process. The second largest has been SSU Drives Switzerland. SSU Motors and Generators Sweden has only one connected case. SSU Motors and Generators Italy have two connected cases, created in January.

The case amount of SSU Motors & Generators Finland is the highest of all SSUs. The case sub type has mainly been replacements for MG Finland. The way of SSU Motors and Generators Finland work is that they create the link to the opportunities themselves. They create the case since the LSU calls them and the SSU employee creates the case in Salesforce. That can be seen that the MG Finland has linked cases from ABB Location countries such as China and Indonesia, where the process has not been launched yet. This is a different method from the opportunity case function process. However, according to Head of Global Motion Support and Local Division Manager the other methods still work since the cases are linked to the dashboards and reports and therefore can be monitored.

The cases linked to the SSU Italy have been low. According to Local Division Manager, it was an expected result. Sweden, Italy and Switzerland SSUs have

been new users to Salesforce. They have not been using the Salesforce case function before the launch of the opportunity case function process.

One key finding was the low amount of connected cases to SSU Drives Finland, which was the main unit chosen to be investigated with this thesis. SSU Finland have five connected opportunities, generated by LSU United States. Five connected cases to SSU Drives Finland is a low number compared to the information that SSU Drives Finland receives hundreds of cases monthly. Furthermore, the opportunity value of all those SSU Drives Finland connected cases has been lower than any other SSUs. This finding is unexpected since the case amounts are high in SSU Drives Finland as mentioned in the current state analysis. It could be explained based on the analysis of the salesforce data that the cases between SSU Drives Switzerland and SSU Drives Finland can mix.

The Service category for the linked SSU Drives Finland cases has been spares and consumables. There is potential for larger opportunity value information for SSU Drives Finland since SSU Motors and Generators Finland has connected many opportunities from LSU Countries in Asia, where opportunity values have been big.

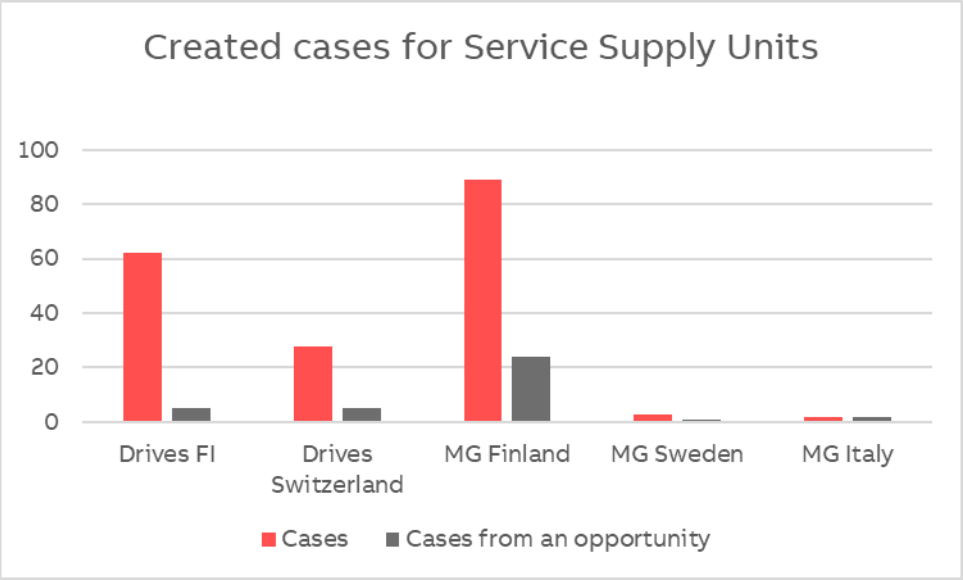

Figure 15. Cases created compared to cases linked to an opportunity.

Based on the Salesforce data (figure 15), 174 cases have been created where the case sub type has been chosen by the LSU. But there are more created cases that do not involve opportunity than cases connected to an opportunity.

The case amount has been bigger than the linked cases to an opportunity. Based on the meeting with SSU Drives Finland, the problem before has been the lack of connection to the opportunities. Based on the analysis done for this thesis, the new process still has not solved that problem. Potentially, the created cases involve opportunities, but LSU has not linked them. The cases with sub type included have been created by already rolled-out countries India, Finland and the United States.

Moreover, in this thesis, the image of SSU cases connected to an opportunity by week was created, illustrated in figure 16. LSU United States came onboard with the process on 29 February 2024. LSU Finland and LSU India came on board, in week 12, three weeks later than United States. It can be seen that the number of cases has increased since LSU US onboarded. The impact of LSU Finland and LSU India has been low to the amount of connected cases from an opportunity.

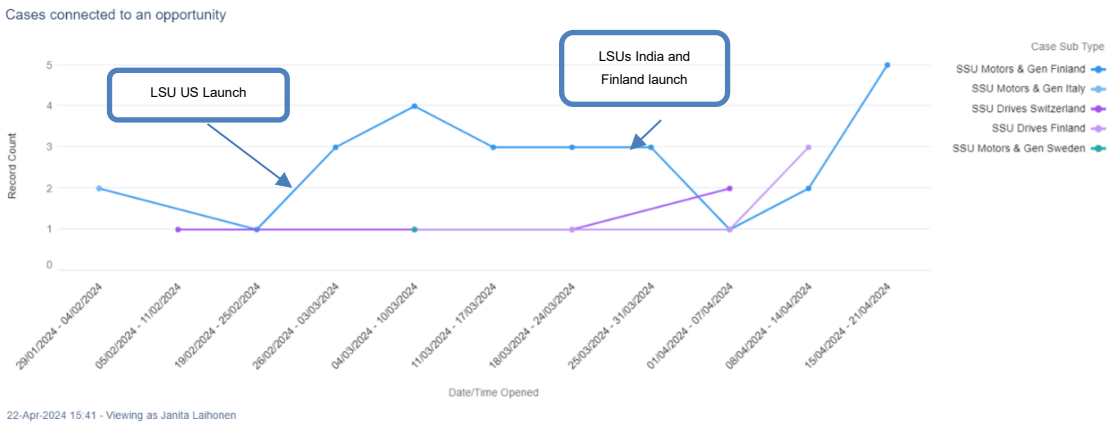

Figure 16. Cases connected to an opportunity per week.

As seen in figure 16, the case amount has been increasing for MG Finland. The case amount for other SSUs did not increase after the launch meeting with LSU

United States. The case amount for SSU Drives Switzerland and Finland has started to increase at the beginning of April. The impact of India and Finland launch meeting did not increase the amount for SSU Drives Finland since all the cases for that SSU have been generated by LSU United States. Therefore, it can be concluded that the process takes time to start the flow of connecting opportunities to cases.

With the new process the already available response time measure was still not validated at the end of this thesis. In this thesis, response time analysis was executed based on the salesforce data of the process response time. The response time was calculated in Excel by days. The calculation was based on the days between function between date opened field and date closed field data information. The calculated average response time is presented in figure 17.

Service Supply Unit	Average of Response time
Drives Finland	12,66666667
Drives Switzerland	22,5
Motors & Generators Finland	10,5
Motors & Generators Sweden	13
Grand Total	**13,8**

Figure 17. Calculated response time for cases between LSU-SSU.

As seen in figure 17, The average response time in days by SSUs to the cases created by LSUs is 13,8 days. The shortest response time is from SSU Motors & Generators Finland, 10,5 days. The longest is SSU Switzerland, 22,5 days. The longest response time can be affected by that SSU Drives Switzerland and SSU Drives Finland cases can be categorized mixed and therefore it takes time to find the right handler for the case.

The surprising finding from the data analysis was the low amount of linked cases to opportunities. The data of the linked cases compared to created opportunities is presented in figure 18.

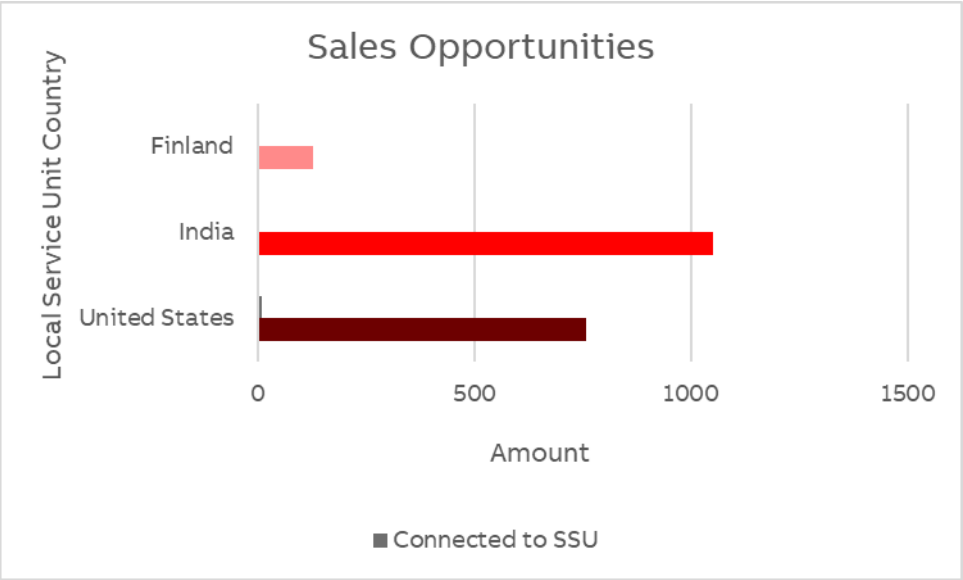

Figure 18. Created Sales Opportunities compared to connected opportunities since beginning of the process.

As seen in figure 18, a large number of opportunities has been created but only a few connected to the Service Supply Units. In this thesis, a report and dashboard were created to view the data of the created opportunities per involved LSU country. The data was filtered as the date from when the roll-out was executed to the LSU country. For example, LSU United States the roll-out was 29 February 2024. Since then, LSU US has created 759 opportunities and just 9 cases are linked to the relevant SSU.

Furthermore, the LSU India, which the stakeholders expected to be a high volume country has only created one case, according to the new process. However, it has created 1049 cases since the roll-out phase (figure 18). Based on the interview with the process owner, India was expected to provide numerous cases according to the process. The Global Sales Excellence Manager raised concern about the amount of created cases from India.

The third and last LSU country involved in the process is Finland. The created case amount according to the process is only one. 129 opportunities have been created since the implementation in LSU Finland unit. Therefore, it can be concluded that the new process roll-out has not been effective and systematic for both LSUs and SSUs. There should be an investigation, to why the number of

created cases from opportunities is low since a large amount of opportunities are created.

The benefit from the new opportunity case function process is that all launched LSU countries introduced to the new process, have used it, instead of the old method of using source location field. That means the LSU countries follow the guide of using the sub type field in Salesforce when they create a case.

One key finding is that Argentina could be a good process implementation country. In this thesis, the old source location field report was investigated. Based on the investigation, Argentina has already created many cases with connection to SSUs by using source location-field in Salesforce. Based on the data, in April alone Argentina has linked six opportunities to the Helsinki Finland source location. Therefore, it can be suggested that Argentina would be a successful country to roll-out the Opportunity Case function since the country is already using the case function in Salesforce and has knowledge how to involve the needed Service Supply Unit to the case.

5.2.2 Recommendations

The proposal includes recommendations for improving awareness of the process, communication, roll-out of the process and reducing resistance from the Service Supply Units. Furthermore, the proposal includes recommendations for the key KPIs to monitor the success of the process. The initial proposal is presented in table 4.

Table 4. Initial Proposal.

Weakness	Theory	Stakeholder suggestions	Proposal
Lack of Awareness of the opportunity case function process	4.3 Improving communication and employee awareness during change process	Global Sales Excellence Manager: Could send reminders by email.	Send out regular updates -when LSU country has come on board - reminders that Service Supply Units have cases to be responded
Lack of Communication	4.3 Improving communication and employee awareness during change process		Send out Surveys -for both LSU and SSU employees -Create Microsoft Teams channel
Service Supply Units resistance to change	4.1.1 Dealing with in denial and passive employees 4.1.2 Dealing with resistance of change	Head of Global Motion Support and Sales Excellence Manager; Should increase understanding of the business needs	Set up meetings with Service Supply Units
Poor Roll-out phase planning	4.2 Good practises for rolling out a Salesforce project		Managers create Roll out plan on which timeline will LSU are rolled out for the process
KPIs	4.2 Good practises for rolling out a Salesforce project	Local Division Manager :Average response time and connected case amount	Set targets for response time between LSU-SSU and targets for the amount of connected cases form the opportunities
Implementation	4.2 Good practises for rolling out a Salesforce project		Monitor LSU case creation from an opportunity

For improving the roll-out phase, the management should create clear roll out plan, on which timeline different LSUs countries come on board. In that way, they plan the communication and targets better for the process. This suggestion is based on the theory regarding good practices for rolling out a Salesforce project.

Based on the current state analysis the problem has been not using effective ways to communicate the implementation of the opportunity case function process to the Service Supply Units. The information sharing has not been effective and regular from the process leaders to the Service Supply Units. There is a Microsoft Teams channel created, but it is not interactive with the end users of the project. Therefore, one recommendation for improving the communications is to create an interactive Microsoft Teams Channel for the Service Supply Units.

Furthermore, the proposal indicates that reminders should be sent to all SSUs, when a new LSU country has been rolled out for using the opportunity case process. This was a recommendation based on relevant theory regarding good communication during change management. Based on the proposal suggestion interview, Global Sales Excellence Manager also proposed that he could send reminders every two week to the Service Supply Units.

Based on the suggestions from the theory regarding improving employee awareness and communication for the change process, a survey should be sent out to all SSUs and LSUS users of the opportunity case function. In that way, managers can collect feedback from both LSUs users and SSU users.

According to the Head of Global Motion Support, the process will fail if Service Supply Units are left alone and not provided with more guidance and discussions. Based on the interview with Head of Global Motion support, the process implementation needs a change of mindset, awareness and building common understanding. Key suggestions from the Global Motion employee were that the flow of communication has to be made right. The Service Supply Units will need guidance and patience to follow up the process. Therefore, the recommendation is to set up meetings with the Service Supply Units. The meeting should include

convincing the Service Supply Units what is the business need of the process and guidance regarding the process steps.

Based on the suggestions of the Local Service Unit employees, it would be crucial that the Salesforce data filling regarding opportunities and cases is as fast and easy as possible. Therefore, the Service Supply Unit needs to be reminded to follow the process according to the guidelines and not make changes based on their wishes since Local Service Units' work will be more difficult. The Local Service Unit needs to be discussing with the end customer more than remembering extra information for all different Service Supply Units. These further developments should be an internal topic of the SSU. For LSUs the process should be straightforward and simple. These requirements should be discussed in the meeting with the Service Supply Units.

Therefore, one recommendation for mitigating the resistance of change from the Service Supply Units is that there should be the meeting at least with SSU Finland and MG Finland regarding the editing of the cases. Based on the Head of Global Motion Support, it is not typical to have the rights to edit the information on the case queue. But he proposed to have one test case and discuss it together with the members of the Service Supply Unit. Then it is possible to give the necessary rights but still make sure that the process is followed.

According to the Head of the Global Motion, the meetings alone are not enough if people do not constantly work in Salesforce. One possibility is after the process has been rolled out and there is more feedback available, if the response time from the Service Supply Units is long, there could be a power automation function. This means that an email would be sent automatically each day to people to receive a notification of the needed response for their assigned cases. This could be done by having discussions with the Service Supply Units. It takes combined efforts to make the process work.

Taking into account proposal suggestions from the Sales Managers, they need the link to high value opportunities. It is thus recommended that the company

should monitor that the Local Service Unit creates the cases according to the process and especially if the opportunity has high value.

Therefore, one recommendation is that the case company sets targets for the process data in Salesforce for monitoring the use of the process. This means a target amount for the number of connected cases from an opportunity per month/week should be created. Furthermore, the target should include a response time target. By having the data available, the sales team could predict the amount of opportunities.

Therefore, the last recommendation is that the LSUs opportunity case creation should be monitored so that they can be contacted if the amount of connected cases are low compared to the opportunities. If there is not an opportunity connected to the case, all of the benefits of the sales opportunity case function process are not achieved, such as the visibility to Service Supply Units. a good strength identified in the current state analysis was that the case company has created Salesforce reports and dashboards for recording and viewing data regarding the opportunity case function process. The ability of having the reports and dashboards available will help monitoring the process. The reports provide a way to monitor the linked cases per country in Salesforce. Based on that information, actions can be taken for each Local Service Unit country.

5.2.3 Trend Analysis and Forecast

The desired outcome of the proposal included a trend analysis of the case opportunity data from Salesforce. The Local Division Manager wanted to have information of how many cases have been created according to the process by week and month and how it develops over time.

Key metrics for the opportunity case process were discussed together with the Local Division Manager. The Local Division Manager proposed that the key metrics are case response time from the Service Supply Unit to the Local Service Unit. Furthermore, key metrics proposed are the amount of cases per month and

week. These metrics were used for creating the trend analysis and forecast, presented in figure 19.

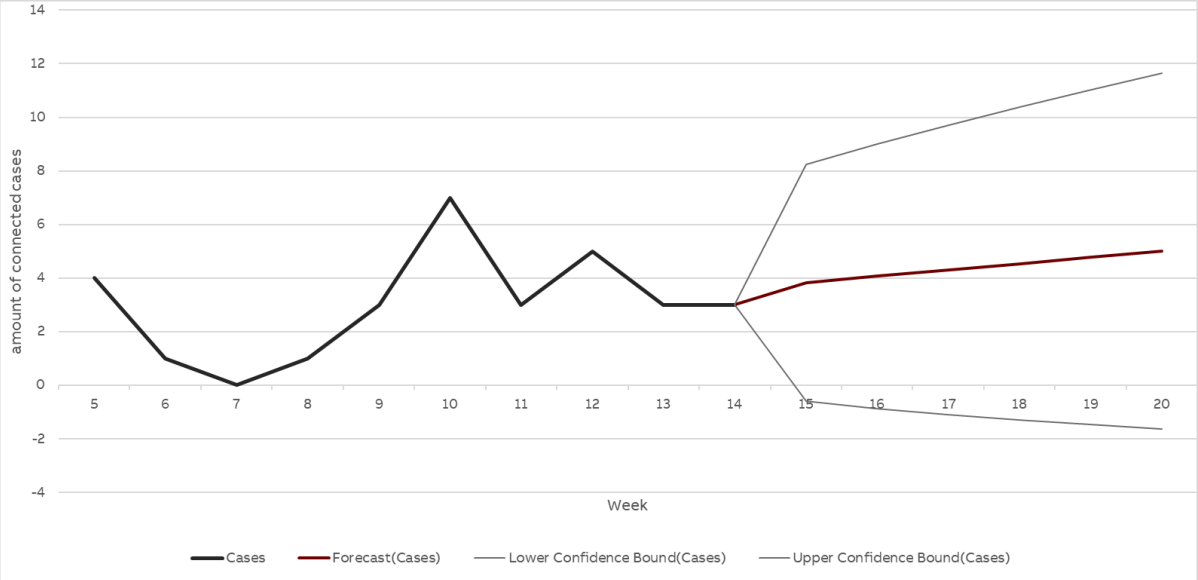

Figure 19. Trend analysis of connected opportunities.

A trend line chart was made for the proposal, as seen in figure 19. The chart was made by using the theory of creating a trend line forecast on Excel. The forecast instructions were used based on the theory. The forecast case field presents the forecasted predictions of cases for next six weeks. Based on the theory, the predictable case amount would be between the forecast case number and upper confidence bound.

The trend function, illustrated in figure 19 was used to predict the amount for cases coming in next weeks. The known y values were the case amount numbers for weeks 5-14. The know x values for the formula were the week numbers. The new x values were the desired weeks 15-20. The formula resulted in predicted case amounts for each week 15-19. The forecast was made as there were three LSU countries involved. Based on the forecast, there was a steady increase in the amount of connected cases per week. The monthly forecast was also made, presented in figure 20.

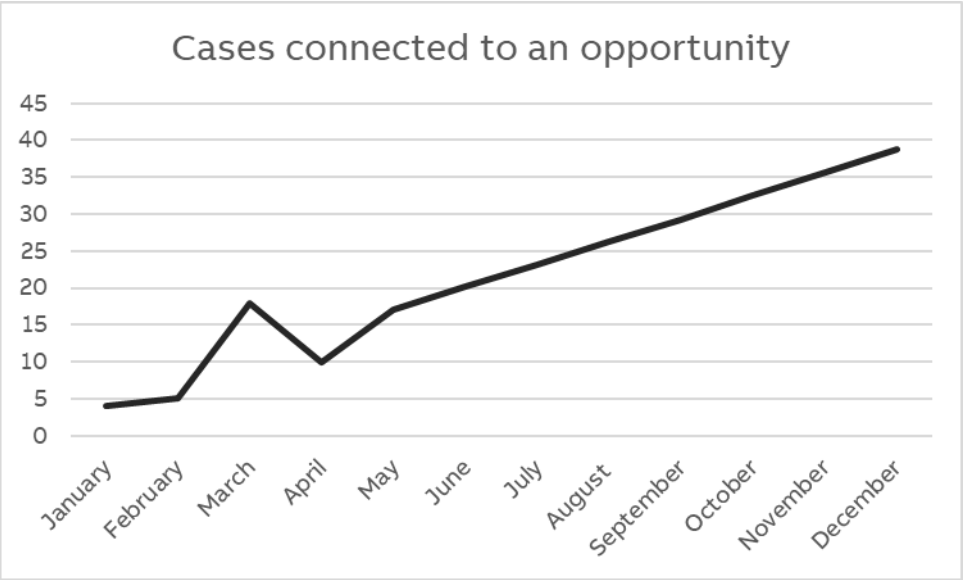

Figure 20. Excel trend function forecast for cases connected to an opportunity.

Figure 20 includes the forecasted data by using the Microsoft Excel trend function. The data was conducted from Salesforce for January, February and March. The months after that were forecasted. Based on the forecast ,there would be 39 cases monthly created in December.

This concludes the proposal building chapter. The chapter 6 is presented next and it includes the validation of the created proposal.

6 Validation of the Proposal

This chapter presents the validation of the initial proposal. Meeting with the Local Division Manager was held on 18 April 2024 and in the meeting the initial proposal was presented. The purpose of the meeting was to validate the proposal and gather feedback. Based on the feedback, the final proposal was made.

6.1 Overview

Validation for the initial improvement proposals was carried out by setting up a meeting with the Local Division Manager. The objective of the meeting was to evaluate the data analysis and proposal recommendations for reaching the objective of this thesis. In the meeting, the data analysis overview of the process was presented as well as the suggestions to the key improvement ideas which were identified in the Current State Analysis phase. Open discussion of the data analysis and the proposal recommendations resulted for final adjustments to the initial proposal. The developments for the initial proposal are presented in chapter 6.2.

6.2 Developments to the Proposal

Based on the meeting with the Local Division Manager, the initial proposal data analysis and the suggested recommendations for improving the communication and planning the roll-out better were good.

The Local Division Manager thought that the finding of the potential of Argentina as the new roll-out country was very good.

According to the Local Division Manager, the proposal of setting the key KPIs, would require more information of what KPIs other than case response time and amount of created opportunities would be good to have.

The Local Division Manager suggested improvements to the trend analysis of the initial proposal. The results of the data analysis indicated that there were only under 40 cases linked to the opportunities. Therefore, the Local Division Manager proposed that the trend analysis would be hypothetical as if in the created cases there would be 10 % linked cases to the opportunities and what the chart would look if there would be 20 % opportunities linked to all of the cases. Furthermore, it was requested to involve the forecast that there would be 10 more countries involved in the process. In the initial trend analysis, only three countries were taken into account.

The original idea was to have all of the 50 Local Service Unit countries on board at the end of June. Therefore, the trend analysis will be hypothetical and takes into account if there were more countries involved in the process.

6.3 Final Proposal

The outcome of the thesis is a list of recommendations in order to improve the sales opportunity case function process. The final proposal includes recommendations of managerial activities for improving the process as well as trend analysis and forecast. Moreover, the data analysis was presented in chapter 5.2.1 and is key part of the outcome of this thesis.

6.3.1 Summary of Recommendations

The recommendations for improving opportunity case function process are presented in table 5. The recommendations were developed with the identified weaknesses form the Current State Analysis and took into account suggestions from the stakeholders and relevant literature.

Table 5. Final Proposal.

Key Improvement Area	Recommendation
Change management: roll out phase	Managers create Roll out plan on which timeline LSUs are rolled out for the process
Awareness to Service Supply Units	Send out regular updates to Service Supply Units when new LSU countries are involved in the process
Awareness and communication	Send out reminders every two weeks for Service Supply Units concerning the case respond
Communication	Create Microsoft Teams channel for all of the Service Supply Units
Communication	Send out Surveys for requesting feedback from Service Supply Units and Local Service Units
Resistance to change	Meetings with Service Supply Units
Implementation	Monitor Local Service Unit case creation from an opportunity
Implementation	Target KPIS to measure: Amount of created cases from an opportunity, response time, case amount

As seen in table 5, the recommendations for the roll-out phase of the process are awareness and communication, resistance to change and implementation. The reasons for the suggested recommendations are described in chapter 5.2.2.

6.3.2 Trend Analysis

The trend analysis and forecast were made by month and took into account new countries involved as suggested by the Local Division Manager. The forecast was made based on the data available of created opportunities per country. For having a hypothetical forecast to meet the wished outcome of the sales opportunity creation process, the excel forecast included 10 new countries to be involved in the process. The countries were Spain, Germany, Netherlands, France, Portugal, Panama, Mexico, China, Japan and Australia. The Excel analysis was executed, by having new countries in different phases as it will happen in the process. Such as there were already the data of the United States,

Finland and India. And then the next phase would include Spain, Germany and The Netherlands. Then the next month would include France and Portugal. Then next, Panama and Mexico would be rolled. And after that, China, Japan and Australia.

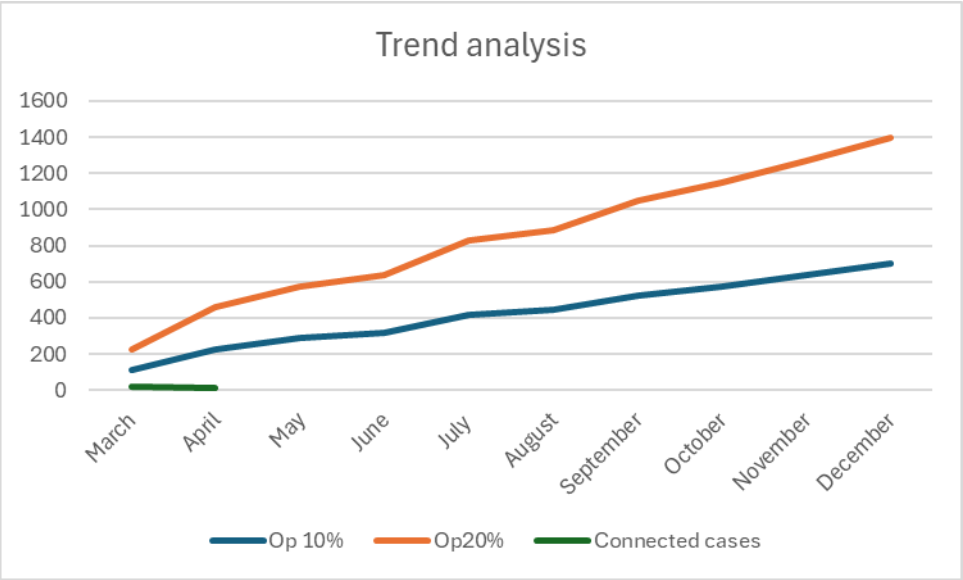

Figure 21. Trend analysis for hypothetical scenario of the process.

As illustrated in figure 21, the green line indicates the real amount of connected cases from March and April. The orange line presents the amounts for case amounts if 20% of the created opportunities will be linked to the Service Supply Units. The blue line presents the values if 10% of the opportunities will be linked to the Service Supply Units.

The prediction was executed by investigating the data of how many opportunities the mentioned countries create on average per month. For example, Spain creates 793 opportunities per month. Based on this data, it was calculated, what is the amount of 10% of these created opportunities including a case and what is the amount of 20% of these created opportunities involving a case. Then, the amounts were predicted by using the Excel forecast function.

The forecast function was used to calculate the amount for September, October, November and December. It was calculated that the mentioned 10 countries would come on board with the process by the end of July. Then the forecast made predictions from July-December, based on if there would be more countries involved at the same phase as two or three new countries per month.

Furthermore, the forecast included timeline, which ended to December. The results of the Excel forecast indicated that in December, there would be 1399 cases linked to an opportunity if the Local Service Units will link 20% opportunities to the Service Supply Units. If the Local Service Units would link 10% of the opportunities to the Service Supply Units, there would be 699 cases connected to an opportunity.

Based on the forecast, there would be overall 3900 cases connected to an opportunity by the end of December.

This concludes the validation of the final proposal. The final chapter of this thesis is presented in the next chapter. The conclusion chapter includes the executive summary, next steps and thesis evaluation.

7 Conclusion

This chapter consists of three different sections. The first section presents the executive summary of the thesis. The second section presents the next steps for the case company. Finally, the third section includes the thesis evaluation.

7.1 Executive Summary

The objective of this thesis was to analyze the salesforce opportunity case function process of ABB Oy and provide improvement suggestions to the process. The case company began the new opportunity case function process at the end of February.

In this thesis, data was collected in three different phases. Key stakeholders were interviewed in the current state analysis phase and proposal building phase.

The key findings from the current state analysis were lack of awareness of the new process, poor roll-out planning, lack of communication regarding the change process and Service Supply Units resistance to change. Based on the current state analysis results, the relevant theory was investigated to produce the proposal.

The proposal includes data analysis of the data regarding sales opportunities linked according to the new process. Due to the new process, the proposal also presents forecast and hypothetical trend analysis. Furthermore, the proposal includes improvement actions for improving process roll-out planning, improving employee's awareness of the process and training the Service Supply Units and mitigating the users' resistance to change.

The main findings are that the opportunity case function process is still at the beginning phase. It requires more communication and education for the Service Supply Units involved. The current communication methods are not sufficient.

Moreover, one main finding from the data analysis was the low number of created cases linked to an opportunity. The case amount has been bigger than the linked cases to an opportunity. Based on the analysis done for this thesis, the new process has still not solved that problem. Therefore, the recommendation is to increase monitoring regarding the case creation from the Local Service Units.

The expected benefits from the proposal are the availability of the analyzed data of the sales opportunity case function process and the forecast for the future state of the process. Furthermore, the value of the thesis for the case company is the suggestions for improving the change management of the process thus the implementation of the process will improve over time as the new Local Service Unit Countries will be rolled-out. The process implementation will continue at the case company, therefore having the analysis of the state of the process will help the case company to improve the process and reach the desired objectives.

7.2 Next steps

Next steps for the case company should be gathering data of the process when more countries will be involved. Moreover, the case company should analyse the data according to the target KPIs presented in the proposal. Furthermore, the next step would be to analyse if the created cases could involve an opportunity. This will result in training the Local Service Units to always create from an opportunity and not just the case.

Over time, when there will be enough data and the process flow between the Local Service Units and Service Supply Units, it would be preferrable to organise a meeting between the Sales and Operations teams in Service Supply Unit Drives Finland. The need for material forecasting was presented in the current state analysis and the problem was that the sales team has had difficulties to predict the information regarding the opportunities. Therefore, when there would be data available to make the forecast, it would be good to discuss how it will help material forecasting.

7.3 Thesis Evaluation

The topic of this thesis was chosen by the need of the case company. The objective of the thesis was reached, and project plan was followed. Furthermore ,the research design was followed throughout the thesis.

Meetings with the thesis supervisor of the case company were held and provided information related to the topic and suggestions how to proceed. All of the stakeholders of the case company helped to meet the thesis objective.

The challenge for this thesis was the data collection and process roll out timeline. Based on the start up phase of the thesis, it was said that the new opportunity case function process begins in February. Based on this information, the project schedule was created for the interviews mainly for the end of February and the start of March. The scope of the thesis was to focus on SSU Finland and not all of the SSUs involved. Therefore, the SSU sales manager and other stakeholders of SSU Finland were interviewed and not Sales Managers of Sweden, Italy and Switzerland. However, SSU Finland had only got 5 cases according to the process by the few weeks before the end of the thesis project. Therefore, the analysis and solution phases include an analysis of the data available from all of the SSU connected cases.

One timeline objective of the thesis was that the data analysis could be done by the end of March and proposal and suggestion in April. However, the Local Sales Unit countries came on board with the process relatively late for the thesis schedule. LSU India and Finland were informed of the new process at the end of March. This affected and resulted the data amount for the created cases according to the process and therefore the data analysis was done in April instead of March. The current state analysis was conducted by the data available at that time of March and there were only two created cases from LSU US. At the end of the thesis schedule, there were still not many cases for providing accurate information and predictions for how to benefit from the data.

It was agreed with the Local Division Manager that the roll-out phase of the process should have been more systematic and effective during March and April to benefit the outcome of the thesis.

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Opportunity Case Function process

Appendix 1. Opportunity Case function process