
Rohit

# To propose recommendations to improve the product sales offer follow up process

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## Preface

This thesis was challenging but rewarding experience. It helped me learn how to deal with real business problems and find practical solutions. I am very thankful to Viking India group for letting me work on a case project. It gave me a better understanding of how projects are done and how to improve weak areas in a company.

I truly appreciate Dr. James Collins for his constant support and patient guidance throughout this journey. Big thanks to M.A. Sonja Holappa for helping me with the writing process and showing me how to express my idea clearly.

I also want to thank Mr. Sami Sanio and all other mentors who supported me during this work. Their advice, feedback, and encouragement kept me focused and helped me make steady progress.

The journey has been supported by family and friends. Their belief in me kept me going. completing this thesis is a big achievement for me, and it has prepared me to face future challenges with confidence.

Espoo, 05 May 2025
Rohit

## Abstract


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This report revolves around the issues followed up in the sales process by the best brand in the kitchen and bath fittings industry, Viking India. The products might be high-end. However, the company could not make the leads convert into confirmed orders mainly due to incompetent follow-up strategies. The key issues concluded were inadequate personalization in communication, insufficient tracking systems, long response times, and unclear communication of the product benefits. Also, data analytics are underutilized. These are challenges that significantly hinder customer retention efforts by the company and make conversion rates less than satisfactory, and hence, sales turn out to be unsatisfactory. The issues that are described will be handled in this suggested strategic framework using customer segmentation, implementation of automation systems. Furthermore, training sales teams, adoption of data-driven methods, and improved communication channels can also solve the issue. In addition, the report encourages continuous feedback loops and data analysis so that the process of sales follow-up becomes more precise and adapted according to customers' expectations. This approach optimizes the utilization of resources to convert prospects to customers, after which it will strengthen customer relationships to achieve success in this rather competitive market.



Keywords: Process, Improvement, service, communication

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# 1 Introduction

Viking India is one of the premium kitchen and bathroom fitting brands, primarily identified with innovation and quality. The inefficiencies in the sales follow-up processes leading to customer dissatisfaction and mistrust caused by non-personalization, poor follow-up, and delayed responses are some of the issues that need to be considered. Sales follow-up strategies are crucial for the current market when it comes to highly competitive prices and issues like customer concern, value propositions, and lasting relationships. The report describes some of the major issues in the current scenario of Viking India and gives a strategic framework toward better improvement of sales processes while enhancing customer satisfaction and yielding sustainable growth.

## 1.1 Business Context

The study of the present thesis represents an Indian brand Viking India which is dominantly present in the niche markets of kitchen and bath fittings. Jalandhar, India-headquartered-Viking is known for the durability and high quality of its products, serving a wide range of customers. Beyond 550 cities in India, Viking India also has footprints in some neighbouring countries, indicating the wide reach and reputation of the brand in the region.

The product portfolio of the company has been designed to fulfil the requirements of most customers right from homeowners to architects, interior designers, contractors, and property developers. Innovative in their offerings, the products are focused on providing functional and aesthetic solutions at the same time. That is, the products not only serve the basic practical needs but also elevate the overall design of kitchens and bathrooms.

Mainly, the focus is on advanced manufacturing technologies and the best possible materials to guarantee the longevity and performance of fittings. According to those characteristics, Viking India keeps maintaining high standards

of durability and design, which are placed at the centre of their market success. Moreover, the brand has also developed sustainability measures in its operations, including water-efficient technologies in product designing; It conforms to global standards for environmental responsibility.

Viking India has gained excellence and innovation in the industry. It continues to expand its presence in the market as well as the products that it has, keeping pace with the changing demands of customers. It is important to note that the author is not an employee of the case company.

## 1.2 Business Challenge, Objective, and Outcome

The case company is facing a business challenge, which has been characterized as a situation of attaining declining sales, mainly due to the company's inability to close its sales offer as a confirmed order. Additionally, it has not adequately considered the consumer view as to whether that product is competitive or not. Moreover, there is some difficulty in gauging its market potential or standing out from rivals. The failure of these challenges has inhibited the company from retaining the existing customers and giving it more options to attract new customers, which can influence the non-growth path of the company and its position in the market.

To solve this problem, the case company intends to improve the follow-up process on sales offer submissions to convert them into sales. However, necessary strategies and actions to achieve this improvement have not yet been established. A well-organized and efficient follow-up process can restore customer confidence, clarify product value, and thereby improve sales performance.

The objective of the thesis is to propose suggestions to improve the product sales offer follow-up process. Key determinants analysed in the proceeding chapters for sales decline include product competitiveness, consumer perception, and the following gap. The dissection also includes industry best practices and strategies for optimizing sales processes.

Thus, this thesis aims at providing a complete and executable set of recommendations to improve the company's sales offer follow up process. Through these recommendations, the company hopes to enhance conversion of sales offers to orders thereby meeting sales objectives.

## 1.3 Scope and Outline of the Study

The process in place for following up on sales offers within the study is about investigating the reasons leading to low conversion sales ratios and recommending improvements to the process. It also entails strategies that will address issues like product competitiveness and consumer perceptions. The actual implementation of the recommendations or any pilot of the proposed changes not included in this study.

The study consists of 7 sections. The introduction to the study is followed by Section 2, which describes the project plan, the chosen research approach, the research design, and the data collection methods. Section 3 reviews related literature on improving sales processes and explores best practices for enhancing sales offer follow-ups. It also outlines the conceptual framework of the study. Section 4 captures and summarizes the findings from the current state analysis of the sales process. Section 5 presents the initial proposal for improving the sales offer follow-up process. The proposal developed in section 5 will be validated through expert feedback in Section 6. The final section of this thesis provides conclusions, including an executive summary, a self-evaluation of the thesis process, and some final thoughts on the study.

# 2 Project Plan

This chapter outlines the framework of this thesis by detailing the project plan. Three important sections stand out. The research approach, research design and data plan collectively form the backbone of research study, defining how the research is conducted, how data is collected and the analysis process.

## 2.1 Research Approach

Research is broadly categorized into two types, basic research or fundamental research and applied research. Basic research is designed to produce theoretical insights and knowledge and often is not immediately applicable. It is useful for academic and theoretical studies. On the other hand, applied research finds use in solving real-world and on-the-job problems.

The approach chosen for this thesis is applied action research. This is in line with the practical nature of the study that aims to yield insights that could be put into action by the company under study, that is, Viking India. It deviates significantly from the cycles of action research as given in textbooks because the time for conducting this research is limited to five months. However, some virtues of action research are instilled in this research in terms of collaborative workings with stakeholders to tackle some specific operational problems.

Action research permits solving a problem in realistic time using practical insights from those related to the problem. Hence, applied action research means the introduction of an operational solution to an immediate problem: enhancing the follow-up process on product sales offers at the case company, Viking India.

## 2.2 Research Design

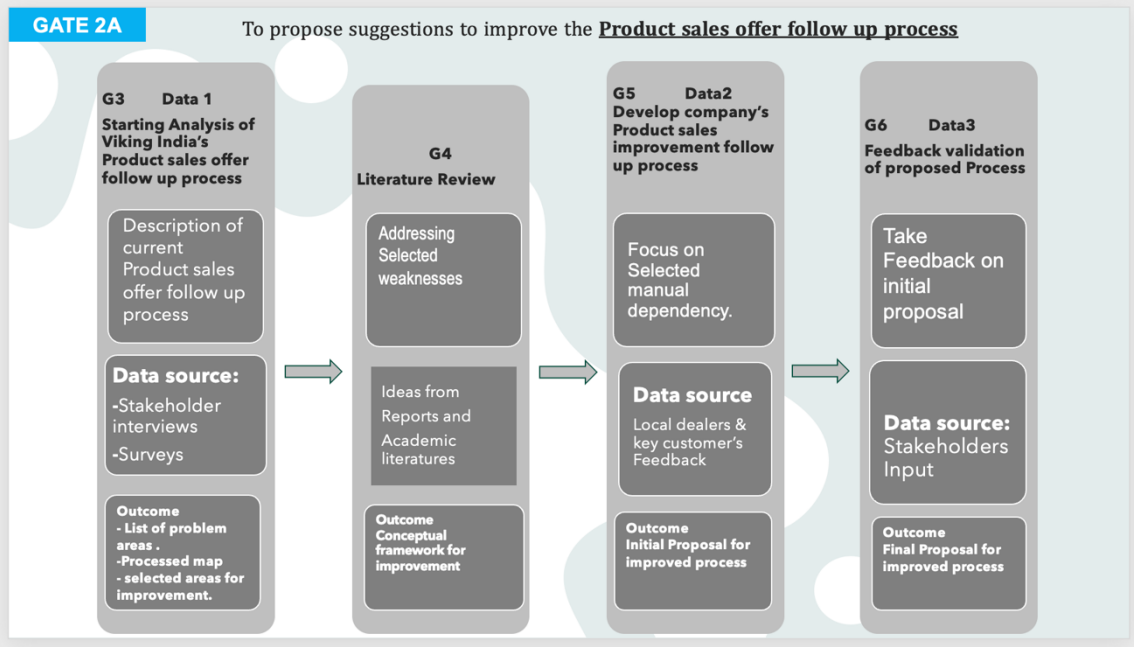


Fig.1 Research design to improve product sales offer follow up process

This research is organized into four component phases, indicated by respective data collection phases: current state analysis literature review, initial proposal, and proposal validation. The collected data in each phase-to-phase provisionally informs the following stages, thereby maintaining logical flow and consistency along the research process.

Thus, looking at the research design, it can be viewed as a four-stage process. For this thesis, the process that is aimed at enhancing the product sales offer follow-up process is the one whose current state must be well understood. Data 1 is essentially a combination of stakeholder interviews and documentation of processes. However, regarding the documentation's reliability, there are some pencil troubles, and stakeholder interviews would play the biggest role in data validation.

The current state analysis is the first step and produces a complete process flowchart that covers the strengths and weaknesses of the current operations.

This stage consists of a literature review in which studies and reports on sales processes for products in similar industries are analysed. The output of this literature review constitutes a conceptual framework, which, with Stage 1 findings, will be used to execute the initial proposal.

Stage 3 workshops are planned to be organized to capture Data 2. Key stakeholders are expected to participate in these workshops to jointly create the first service process flowchart based on findings of earlier research stages. The first proposal is then planned to be piloted in a local organization of Viking India, for feedback which will be collected through interviews and user surveys to improve the proposed process.

Finally, stage 4 consists of the final validation of the proposal through feedback with stakeholders and management. Data 3 collected in this phase is expected to be used to refine the improved process flow chart further before final implementation.

## 2.3 Data Plan

**GATE 2B** To propose suggestions to improve the **Product sales offer follow up process**

| | CONTENT | SOURCE | INFORMANT | TIMING | OUTCOME |
|---|---|---|---|---|---|
| **DATA 1**<br><br>**CURRENT STATE ANALYSIS OF PRODUCT SALES OFFER FOLLOW UP PROCESS** | - Description of current Product Sales Offer Follow-up Process<br>- Process map<br>- List of Problem areas.<br>- Selected area for improvments | - **Company documents**<br>- **Customer survey results**<br>- **Stakeholder interviews** | - **Product manager**<br>- **Marketing manager**<br>- **Sales team**<br>- **Key customer** | **JANUARY** | - Summary of Product sales offer follow-up process |
| **DATA 2**<br>**Develop company's Product sales improvement follow up process** | - Improving selected weekness. | - **Stakeholder 1to1 interviews**<br>- **Dealer's interview** | - **Product manager**<br>- **Sales manager**<br>- **Sales team**<br>- **Finance Team** | **MARCH** | - **Initial proposal** of improved Product sales offer follow-up process |
| **DATA 3**<br><br>**FEEDBACK VALIDATION OF PROPOSED PRODUCT SALES OFFER FOLLOW UP PROCESS** | - Improvement ideas to initial proposal | - **Stakeholder interviews** | - **Company decision maker**<br>- **Data 2 participants** | **MARCH-APRIL** | - **Final proposal** of improved Product sales offer follow-up process |

Table.1 Data plan for improving product sales follow up process.

This research process goes through three critical data collection phases based on the research design stages. Methods of data collection, sources of informants, and other variations apply at each stage, ensuring that a full understanding of the current process is achieved and leaves room for possible improved processes.

Data Set 1 is obtained from stakeholder interviews, existing process descriptions, and process flow maps. This is data meant to provide a thorough understanding of the current product sales offer follow-up process as well as identify problem areas. Since the existing process documentation may not completely reflect current practice, validation through interviews with stakeholders becomes critical.

Data Set 2 is retrieved through workshops involving key stakeholders. These workshops are aimed at gathering insights for redesigning the follow-up

process, focusing specifically on the weaknesses identified in the first phase. The output of this phase is an initial proposal for the improved process co-created with stakeholders.

The third source of data, Data 3, comprises feedback collected from user and management interviews, along with an anonymous survey conducted after the pilot test of the proposed process. It essentially provides insights on how well the proposed process meets user needs and management objectives. The next step in this stage involves developing the final improved process flow chart based on these findings.

# 3 Current State Analysis of the Product Sales Offer Follow-up Process in the Case Company

This chapter explores the current state analysis of the product sales offer follow-up process in the case company, Viking India. It first section provides an overview of the current sales offer follow-up process and how it is implemented across different stages of the company's sales operations. It then examines specific service flow streams, including identifying sales offers needing follow-up, follow-up completion, customer response tracking, escalation mechanisms, and sales status updates.

The chapter concludes by outlining the methodology used to conduct the current state analysis and analysing the strengths and weaknesses of the current process. The findings from this current state analysis serve as the foundation for process improvement recommendations in the next chapter.

## 3.1 Overview of this Data Stage

The current state analysis was conducted for the product sales offer follow-up process in the case company, Viking India. The analysis focused on understanding the existing follow-up mechanism, identifying challenges, and mapping the process to highlight inefficiencies. The primary data collection method involved interviews with key stakeholders responsible for different stages of the follow-up process. A total of 05 informants were interviewed, covering various roles within sales, customer service, and management. The interviews were conducted virtual meetings to ensure comprehensive documentation.

The current state analysis aimed to provide a detailed view of the follow-up process from the initiation of a sales offer to its closure. The interviews were structured in three phases: first, introducing the subject and methodology to the informants; second, presenting a preliminary process map based on existing documentation and previous interviews and third, refining the process map with inputs and additional insights. additionally, a questionnaire with six key

questions was used to gather opinions on strengths, weaknesses, and bottlenecks within the process.

The interviewees were categorized from different areas:

Sales team inside sales representatives, area sales managers, and key account managers.

Service & support: order handling specialists and senior finance managers.

Process improvement team: product engineers and service managers.

Management: vice president of deal fulfilment and higher management overseeing sales performance.

Findings from the interviews revealed that while a structured legacy process flow existed, it was often not followed due to organizational changes, inefficiencies, and a lack of integration with current sales practices. the manual follow-up system, inconsistent documentation, and limited automation resulted in delays and miscommunication. additionally, differences in follow-up practices across different teams led to process friction and inconsistencies, affecting the overall efficiency.

The current state analysis findings highlighted that a standardized follow-up process is crucial for ensuring smooth sales operations and preventing lost opportunities. The next chapters will focus on the identified weaknesses and proposing improvements to optimize the follow-up process.

## 3.2 Description of Current Service Process

The present study on follows up process in the product sales offer is based on written documents and interviews with key stakeholders. It based on the steps of ten functions namely client, including sales, inside sales, service

management, project management, field services, sales order specialist, and finance.

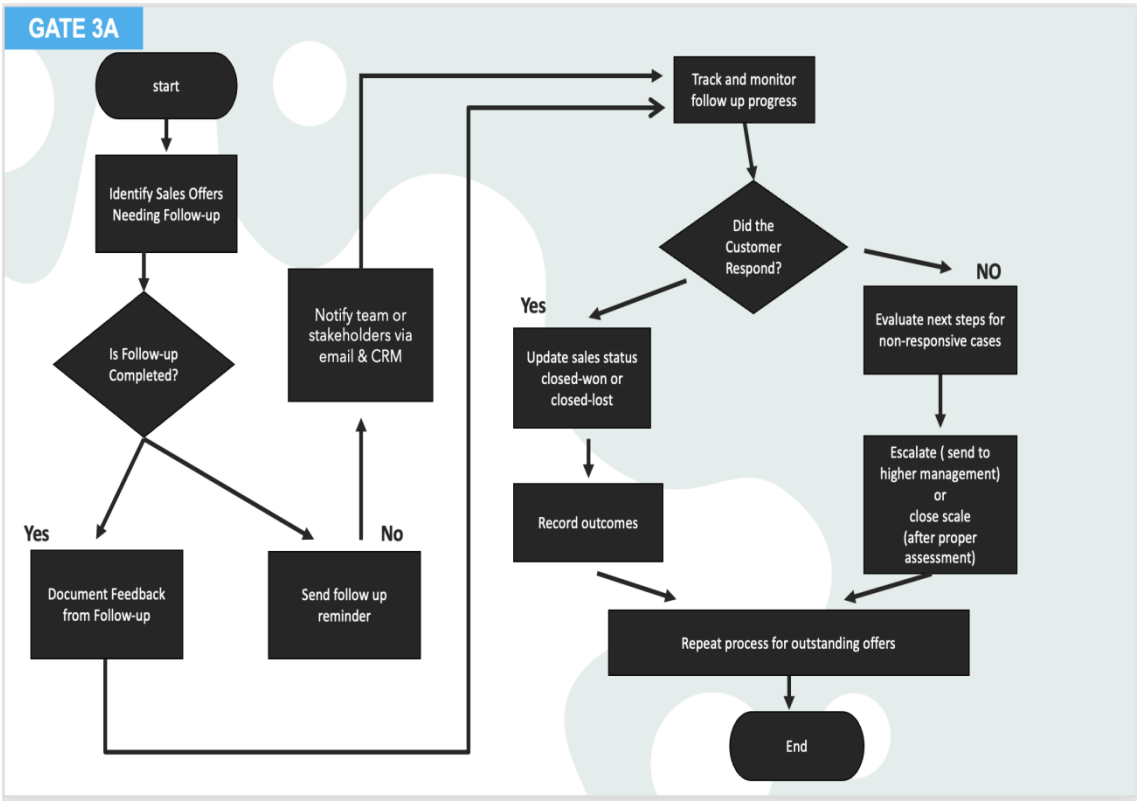


Fig.2 Flow chart of current sales product follow up process.

The process begins when customer start the procedure by placing the orders by telephone, email, or an online form. The sales team must manually enter the order into the system. Once the order entered, the sales team checks products availabilities the items are in stock, the order is confirmed with the customer; none of this automated. On the other hand, if the items are not available, then alternate products or timelines will be discussed with the customer manually. dispatched orders are prepared in the warehouse, and the delivery is coordinated with the third-party logistics. Manual coordination is required here, with no integration for real time updates. The sales team then follows up on the delivery for customer satisfaction through telephonic or email follow ups. However, feedback is informally recorded or stored as emails, spreadsheets or handwritten notes with no common system for tracking customer interaction or follow up status. After the sales status depends on close or won and then send it to record rooms. If the customer status is nonresponsive then evaluate and

escalates it again with the help of higher managements and then repeat the process for every order.

## 3.3 Strengths and Weaknesses Analysis of the Current Process

The current state analysis (current state analysis) involved structured interviews with key stakeholders, leading to the creation of a process map for the product sales offer follow-up process. interview feedback varied—some informants rated the process positively, while others highlighted inefficiencies. interestingly, certain characteristics were identified as both strengths and weaknesses, depending on the perspective of the informants. the following sections detail these findings.

### 3.3.1 Strengths of the Current Process

Several strengths were commonly mentioned across interviews, which can be categorized into three main areas IT / software, structured workflow, and personnel support. these strengths are summarized below:

Strengths

1.Decision points for action

2.Efficient escalation mechanism

3.Closed-loop system

4.Documentation of feedback and outcomes

5.Potential for Automation

6.Professional Appearance for Presentation

7.Detailed overview of the product sales offer follow-up process

To track, nurture, and convert the sales opportunities, there must be an effective product sales offer follow up process. A good follow up system paves way to reduce lost leads, enhances customer interaction, enhancing sales performance and provides insight to introduce new sales process. This section defines components of an optimized system such as action decision points, escalation mechanisms, closed loop tracking mechanisms, documentation, automation potential and presenting professionally.

One of the most critical aspects of the follow-up process is the presence of clear decision points for action, which help guide the sales team on the appropriate steps based on customer engagement. these decision points include identifying offers that require follow-up, determining if the customer has responded, classifying the outcome, and deciding whether to escalate, modify, or close the offer. having structured decision-making criteria ensures that follow-ups are handled efficiently and in a timely manner. additionally, tracking and monitoring mechanisms ensure that outstanding offers do not go unattended, allowing the company to improve its conversion rates and responsiveness.

Another crucial element is the efficient escalation mechanism, which ensures that sales offer that remain unresolved or face customer objections are escalated to the appropriate level within the organization. if a sales representative is unable to obtain a response from the customer, the case is escalated to senior management for intervention. in cases where pricing or customization concerns arise, the sales offer may be escalated to specialized teams such as finance or product management. if necessary, high-priority deals can be further escalated to executive leadership to determine the final course of action. this escalation system prevents stagnation in the follow-up process and ensures that important sales opportunities are not lost due to delays or miscommunication.

A closed-loop system plays a key role in ensuring follow-ups are tracked, analysed, and optimized for future interactions. this system connects customer responses, sales team actions, and crm data to create a structured and data-

driven process. a closed-loop approach allows the company to analyse the effectiveness of follow-ups, identify common customer objections, and adjust sales strategies accordingly. with continuous feedback, the sales team can improve its engagement tactics and refine the follow-up process over time The closed loop system guarantees the reduction of inefficiencies while increasing sales forecast accuracy.

The documentation of feedback and outcomes is equally important in maintaining transparency and improving future sales follow-ups. every interaction should be properly recorded within the crm system to provide a reference for future engagements. this documentation should include customer responses, reasons for accepting or rejecting an offer, common objections, and any adjustments made to the proposal. proper record-keeping prevents repetitive conversations, enhances coordination between sales and customer service teams, and allows for data-driven decision-making. with comprehensive documentation, the company can track patterns, identify bottlenecks, and implement targeted improvements in the sales process.

The potential for automation in the follow-up process can significantly improve efficiency and reduce manual workload. automated reminders can be set up within the crm to notify sales representatives of pending follow-ups, ensuring timely customer engagement. ai-driven lead scoring systems can help prioritize high-value prospects, enabling sales teams to focus on the most promising opportunities. crm automation also allows for seamless tracking of interactions, automatically logging emails, calls, and customer responses. personalized messaging templates can be used to maintain consistency while allowing customization based on customer preferences. additionally, chatbots and ai assistants can handle initial follow-ups, qualify leads, and schedule meetings, reducing the need for manual intervention. by integrating automation, the sales follow-up process becomes more scalable, reliable, and results driven.

However, finally the company should be building credibility and trust with customers by making them trust the follow up process in a professional way, which means that the whole follow up process has to look professional, so clear and concise communication in emails, structured follow up emails, proper documented should be a key steps of which will boost the company brand image. So, sales proposals also should be well formatted, visible, easily understandable, so that customers would receive the polished, the professional presentation.

CRM dashboards should provide sales teams internally with visually intuitive reports and tracking systems to see how things are progressing and to analyse their performance. a good and well executed follow up process leaves a good and positive impression on customers, making it easier to close deals on successful terms.

In conclusion, an optimized product sales offer follow-up process is crucial for improving conversion rates, minimizing sales delays, and enhancing customer experience. by incorporating structured decision points, escalation mechanisms, closed-loop tracking, documentation, automation, and professional presentation, the case company can streamline its sales operations and achieve greater efficiency and success.

### 3.3.2 Weaknesses in Current Process

Despite its strengths, the follow-up process also suffers from significant inefficiencies, categorized into three main areas: it/software issues, structural/process gaps, and personnel-related challenges. the weaknesses are summarized below:

Weakness

1.Dependency on manual follow-up (human errors)

2.Potential for over-escalation

3.Limited flexibility for sales offer

4.No learning or improvement step

5.Customer insight limitation.

Despite its structured approach, the product sales offer follow-up process has several weaknesses that impact efficiency and overall effectiveness. one of the major challenges is the dependency on manual follow-ups, which increases the likelihood of human errors. Since sales representatives rely heavily on remembering, tracking and doing follow ups, much of the current process relies on them, resulting in delays, inconsistencies and or missed opportunities. Automation of follow ups is also not possible without and there are chances that follow ups are not performed systematically resulting into lost sales and poor customer engagement. There is also a chance of inaccurate entry of information into CRM records for manually updating them and handling follow up communications.

The follow-up process also suffers from limited flexibility for handling sales offers, which restricts adaptability to different customer needs and market conditions. the structured approach, while beneficial for standardization, lacks room for customization, making it difficult to adjust follow-up strategies based on the unique preferences of different clients. this rigidity can missed opportunities, especially when dealing with complex negotiations or high-value customers who require personalized engagement and flexible terms. without a dynamic framework that allows for case-by-case adjustments, the process may not effectively cater to diverse sales scenarios.

One major flaw is also the absence of a learning or improvement step within the follow up process- currently, there is no structured process for analysing past follow up, identifying the common obstacles and adopting the continuous improvement. Without understanding from past experiences, sales teams are doing the same mistakes, not refining the engagement strategy, and not delving further into the process optimization. There is no obvious way to improve poor

or bad sales interactions to make future follow ups more effective, thus limiting long term efficiency and effectiveness.

Lastly, the customer insight is flat with the ability to accurately understand and predict the customer need. Without deep insight into the customer preference, customer buying behaviour and customer reasons to be hesitant, the follow up approach only pays attention to re engaging the customer by sales record. Without a robust system to collect, analyse, and utilize customer feedback, sales teams struggle to tailor their follow-up efforts effectively. this limitation reduces the chances of converting hesitant leads into successful deals and can lead to customer dissatisfaction due to generic or irrelevant follow-up approaches.

## 3.4 Summary of the Current Product Sales Offer Follow-up Process

In summary, the product sales offer follow-up process faces several challenges, including manual dependency, risks of over-escalation, lack of flexibility, absence of continuous learning, and limited customer insights.
The current state analysis findings indicate that while the follow-up process has key strengths, including a structured workflow, strong crm software, and committed personnel, these are overshadowed by inefficiencies in software integration, communication gaps, and unclear responsibilities. the next chapter will focus on solutions to address these weaknesses and enhance the sales follow-up process for greater efficiency and improved customer experience.

The current sales follow-up process has several aspects that can be viewed as both strengths and weaknesses. one of the key findings is that flexibility, while beneficial in some cases, also creates inconsistencies and inefficiencies. some teams find the process too rigid, while others believe it lacks structure, depending on the specific country, department, or sub-process involved.

Another major point of contrast is the software used to manage the process. the CRM system is effective in certain parts of the workflow, but it is not fully

integrated manual tracking tools such as excel. this lack of automation and integration results in manual work, increased risk of errors, and inefficiencies in data handling.

Overall, the current sales follow-up process is chaotic and inconsistent, requiring significant structural improvements. the next chapter will explore academic literature and industry best practices to develop a conceptual framework that will serve as the foundation for an improved and standardized follow-up process for the case company.

# 4 Conceptual Framework for Improving the Product Sales Offer Follow-up Process

## 4.1 Overview of the Chapter / Best Practice on Product Sale Offer Follow-up Process

This chapter elaborates on the conceptual framework developed throughout this thesis to improve the product sales offer follow-up process. The framework aims to address certain weaknesses identified in the current state analysis (CSA), thus converging on best practices and methodologies distilled from literature and practitioners alike. The ultimate intent of this framework is the enhancement of the sales process through efficient follow-up, increased customer interaction, and technology-driven conversion. The framework also offers a roadmap for providing fit-for-purpose solutions that cater to the operational context of the case company. By virtue of this, the following unit of functional logic constitutes the proposal phase of this study, namely, this conceptual framework, serving as a basis for the formulation of an economic and quality-oriented product sales follow up process.

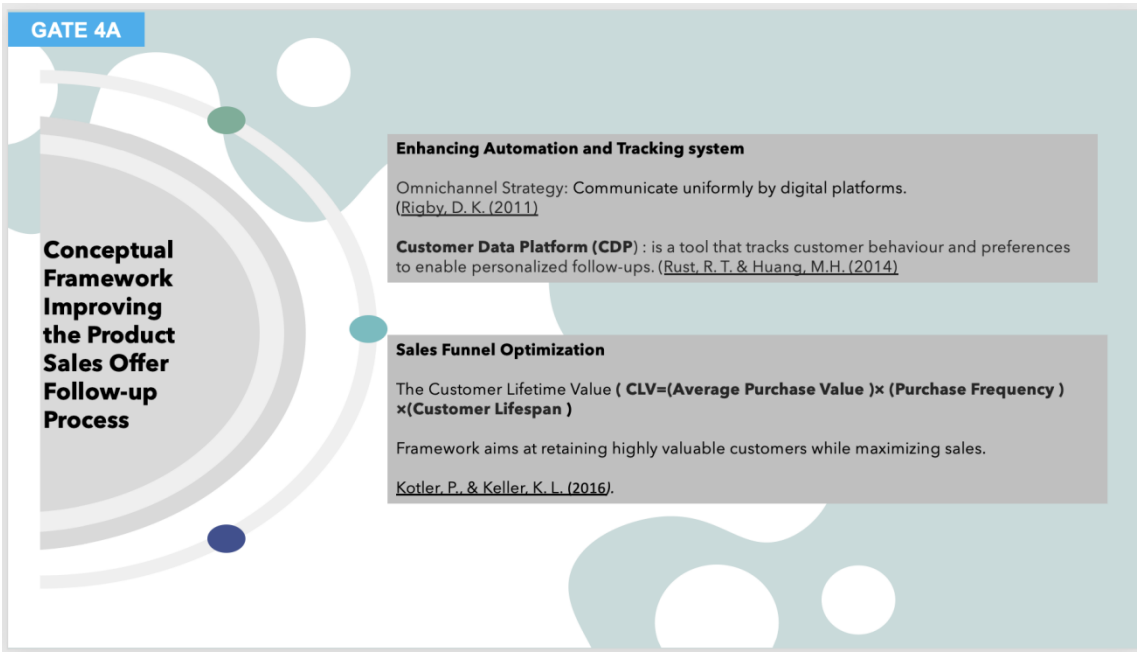


Fig.3 Conceptual Framework

The conceptual framework articulated addresses the major issues that are apparent in the CSA and contributes new insights and findings based on literatures on these issues. It focuses on sales funnel optimization, automation,

and tracking systems and better tools for customer insights. This framework was based in the literature-based development of it by using the terms such as, 'sales funnel optimization,' 'digital sales automation,' 'customer engagement' and 'customer feedback system.' The most relevant analysis of potential sources was made and contrasted in practical implications to ensure improvement of the company's sales follow up process after a thorough evaluation of all potential sources.

Based on the insights from literature and lessons learned from the CSA, the framework suggests an approach in three basic areas to optimize the sales funnel process, increase automation and tracking systems, and develop tools for customer knowledge. It is these efforts that will overcome those current barriers entering sales of the product offer follow up, improve customer satisfaction with the product and commercial results.

## 4.2 Enhancing Automation and Tracking System

**Omnichannel Strategy**

The omnichannel strategy involves keeping communication on an even strong through all the channels, be it email, social and helpdesk agents. This approach of implementing can help Viking India carry forward a seamless and consistent interaction with the customers to enhance the brand perception and engagement. Rigby (2011) says that an omnichannel communication framework helps companies take multiple customer touchpoints in a single stream. Now customers are reaching with brands in various digital channels, the way to handle a synchronized approach of support and communication will assist to avoid discrepancies and have an all-around better customer experience.

**Digital Tools for Automation**

Automating the sales follow ups and the customer interactions does require the incorporation of digital tools. There are a couple of things you can use that automates such campaigns. Such is in Salesforce and chat bots like Drifts which are efficient in handling customer inquiries. Rigby, D. K. (2011) Focus on automation to greatly reduce manual efforts while maintaining delivery of timely response to customers. Using AI tools Viking India can focus on lead nurturing

and follow up processes with less human error and high efficiency. Not only do these tools facilitate straight communication, but they also guarantee that the interaction with customers is recorded and analysed to make a better decision.

**Customer Data Platform (CDP)**

Customer Data Platform (CDP) is a strong tool that tracks the behaviour and interests of the customers and allow businesses to love back in a personalised way. According to Rust & Huang (2014), data driven strategies of the great extent boost customer engagement and conversion rates. CDP is a tool whereby data is consolidated from different sources to get an insight into customer preferences, purchase history, behavioural patterns, etc. The information gained using this method, allows Viking India to better design its sales approach, matching the promotion along with recommendations offered to sale, thereby increasing the chances of conversions. With the implementation of CDP, follow up strategies are data driven opposed to a manual basis, making them more efficient and satisfying customers.

Proposed Solutions for Enhancing Automation and Tracking Systems.

Viking India can incorporate the following advanced solutions into automation and tracking systems to boost the level of communication and improve customer interaction.

Automated campaigns and virtual assistants are first able to revolutionize Viking India’s outreach to customers. AI powered chatbots and automated email responder ensure all the customer queries get responded to promptly. With these tools, one can schedule follow-ups and sends automated reminder that can prevent missed interactions. Integrating automation enables the sales team to focus more on high priority tasks and not interrupt the customer queries managed securely.

Secondly, having an omnichannel communication strategy in Viking India will make sure to provide a smooth and well-integrated customer experience. The

company can also integrate email and social media with the helpdesk platform to guarantee that all the customer interactions are logged and managed in a consistent manner. Prevents miscommunication and offers an overview of the whole customer interaction over multiple communication channels. An omnichannel approach enriches a brand with brand loyalty by presenting consistent experience, no matter how a customer connects to the brand through email, social media, or live chat.

Finally, Viking India will use Customer Data Platforms (CDP) to track and analyse the behaviour of customers. Sales team can utilize CDPs to learn valuable customer preferences and purchasing pattern to send follow up such as offers and suggestion that are relevant. Forecasting customer needs can in turn help predict suitable opportunities for potential buyers and enable the company to engage proactively with them. For these, these data driven insights improve customer satisfaction and boost the possibility of conversion resulting in increased revenue growth.

With the use of these automation and tracking solutions, Viking India can do away with the inefficiencies in manual follow-up processes. Automation guarantees that communication is timely and correct and makes less time in customer engagement. Meanwhile, the company has advanced tracking systems that give detailed analysis of how the company interacts with the customers and hence it can refine its sales strategies. Improvement in this area will enhance the relationship with the customer and make the business scalable.

## 4.3 Optimize the Sales Funnel Process

The first part of the conceptual framework relates how follow-ups at various stages of the sales process can enhance the sales funnel. Kotler and Keller (2016) suggest that sales funnel optimisation should be based on the clear understanding of customer journey stages and the tailored a communication and follow up strategy that will keep customers engaged. This is important to convert the leads to sales by leading them through the process of decision making.

**The Customer Lifetime Value (CLV) Framework:**

CLV = (Average Purchase Value) × (Purchase Frequency) × (Customer Lifespan)

According to Kotler and Keller (2016), the Customer Lifetime Value (CLV) framework is one of the important metrics in the strategic sales management, as it helps businesses to estimate the long-term value of the customer relationships. Knowing and capitalizing on CLV enables Viking India to improve its sales follow-up process to keep high value customers while at the same time increasing revenue growth. Average Purchase Value is Product of Purchase Frequency and Lifetime of the Customer Each of those pieces are so important: the Average Purchase Value reflects the dollar value of each transaction, the Purchase Frequency indicates how often a customer interacts with the brand, and the Customer Lifespan is the amount of time that a customer is associated with the brand. Viking India can also reorient from focusing on short term sales target to long term customer relationship management through focused efforts towards improving customer retention, creating penetration strategies based on customer engagement and decision making with data. The CLV framework implementation includes customer segmentation with the focus on prioritizing the high value clients, utilizing CRM tools to ensure automated follow ups in the form of email campaigns as well as chatbot automated follow ups, as well continuous sales strategy refinements based on the customer feedback and predictive analytic. According to a Forrester Research (2020) study, companies that adopted the CLV approach saw an increase in revenue by 20% and an increase in customer retention of 25 percent. Integrating CLV into Viking India's sales framing can improve customer satisfaction and make it scalable. The CLV framework, in conclusion, acts as a strategic tool, enabling Viking India to create strong customer relationships and growing in a sustainable way and in turn solves the weak points revealed in the Current State Analysis (CSA) and improves the product sales offer follow up process.

## 4.4 Summary of the Conceptual Framework

The conceptual framework is one of the chapters of this book because it is a whole overview of the process that should be made to raise a sales offer follow.

The three main parts of the third phase of the concept have been: optimization of the sales funnel, improvement of automation and tracking systems, yet the biggest contributors to the major CSTA issues are all three of these. Sales funnel optimization is what allows Viking India to bring potential customers through each stage of the buying process and lead to higher conversion rates and a more satisfied customer. Using more human interactions was also found here in the current study to be inefficient, but the follow up activities become efficient because there are fewer human interactions through tools using digital tools like chatbots and Customer Data Platforms (CDPs) we create. Moreover, in addition, there are improved tools that help reveal the customers' feedback and use it to analyze what customers do and develop the data-based strategies to improve customer experience. By bringing the best practices in academic literature and industry experts, the conceptual framework is customized to fit the operational context of Viking India. Such a strategy serves as the base for the proposal phase of this thesis, where practical implementation and strategies for continuous improvement will be formulated to attain the desired sustainable sales growth and satisfaction of customers.

Thus, this chapter is a clear conceptual framework over an approach for complete improvement in follow-up processes for sales offer products. It included optimization of the sales funnel, improvement in automation and tracking systems, and enhancement of tools to gain customer insights, which constitute critical deficiencies highlighted in the Current State Analysis (CSA). Sales funnel optimization enables Viking India to efficiently lead potential customers through several stages of the purchasing process and generate higher conversion rates and customer satisfaction. In the current study, enhancing automation and tracking systems render follow-up activities efficient by using fewer human interactions through digital tools like chatbots and Customer Data Platforms (CDPs). In addition, improved tools give insights into the customers from feedback that can be used to analyze the behavior of customers and develop data-driven strategies for improving customer experience. It includes by bringing brilliant best practices in academic literature and industry experts to stem the conceptual framework in the operational context of Viking India. Such a strategy serves as the basis for the proposal phase of this thesis, where strategies for

practical implementation and continuous improvement will be formulated to attain the desired, sustainable sales growth and satisfaction of customers Efficient follow-up activities through improving automation and tracking systems reduced human interaction via digital tools like chatbots and Customer Data Platforms (CDPs). Improved tools provide insights into consumers from feedback that can then be used to analyze consumer behavior using developing data-driven strategies for enhanced consumer experience. Bringing the best practices in academic literature and industry experts, the conceptual framework is designed to fit the operational context of Viking India. This type of strategy forms the basis for the proposal phase of this thesis, where strategies for practical implementation and continuous improvement will be developed to attain the desired sustainable sales growth and customer satisfaction.

# 5 Conceptual Framework for Improving the Product Sales Offer Follow-up Process

## 5.1 Overview of this data stage

Gate 5 of the thesis focuses on resolving the primary weakness identified in the Current State Analysis (CSA), namely the dependency on manual follow-up in Viking India's product sales offer process. This manual follow-up system has caused multiple operational inefficiencies such as missed customer interactions, inconsistent tracking, delayed responses, and lack of data visibility. These issues collectively contribute to a decline in customer satisfaction and potential revenue losses. In a competitive market where responsiveness and personalization are critical, Viking India's reliance on outdated follow-up methods has created a bottleneck in the customer engagement and sales conversion process. Therefore, Gate 5 aims to systematically address this challenge by integrating theory-backed frameworks, stakeholder recommendations, and feasible solutions that align with the company's current digital maturity and resources.

## 5.2 Focus on Manual Dependency

Inputs from Literature (Conceptual Framework - CF)

To mitigate these challenges, multiple best practices from industry reports and academic literature were reviewed. These practices focus on increasing automation, enhancing communication,

improving sales funnel management which will relatively streamline the sales offer follow-up process.

Improved Automation and Tracking Systems:

Omnichannel Strategy

In an omnichannel approach, communication with customers is done through various means, including email, phone, live chat, and social media, to ensure all channels are utilised. Customers get a uniform experience enabled through complete integration of communication channels with the company. Viking India will be able to integrate all communication with customers into a single system so

that communication is not missed, and follow-ups are done on time and remain personalised.

Customer Data Platform (CDP)

A CDP integrates all a customer's data in one system, making it easier to have access to the summary of each customer's interactions with the company. With a CDP, Viking India would be able to monitor customer behaviour, preferences, and interactions which empowers the sales team to design better follow-up strategies. This data also helps eliminate several inefficiencies for instance by having multiple departments or teams working with a single customer data which leads to fragmented information undermining the quality of subsequent follow-ups needing to be streamlined.

Sales Funnel Optimisation

The Customer Lifetime Value (CLV) Analysis: CLV represents an essential metric when it comes to discerning valuable customers and optimising sales consumption. For Viking India, calculating CLV enables the business to focus its attention on leads that are likely to result in long-term revenue returns. A defined approach towards implementing CLV should also assist in trend identification such as frequently purchased repeat customers or high value stock-keeping unit (SKU) purchasers. This enhances the company's opportunity to target subsequent activities constructed on better segmentation made from trends.

## 5.3 Summary of re-designed Product Sales Offer Follow-up Process

Suggestions from Stakeholders:

Primary stakeholders provided feedback on the sales offer follow-up process that was not as streamlined as it could be, outlining differing suggestions which had the potential of improving this section of the product lifecycle. The stakeholder suggestions focus mainly on the problem areas identified within the current state analysis and seeks to provide relief that is easy-to-execute and growable for Viking India.

Integrated Systems and Automation

An integrated, cloud-hosted automation system was proposed by the stakeholders for the purpose of improving follow-up procedures. As an example, Salesforce, which provides CRM capabilities, could automate numerous functions now performed manually by the sales team, like sending automated follow-up emails, updating customer interaction logs, or recording customer touchpoints. This would enhance the sellers' ability to move away from manual tasks and, therefore, ensure that follow-ups are performed and completed on time.

Real-Time Communication Integration

Along with the automation system, the insertion of communication channels that work in real-time was highlighted. Customers, as stated by stakeholders, prefer rapid communication, therefore the company's responsiveness can be improved by integrating Messaging apps like WhatsApp, chatbots, or automated email notifications, which would ensure the company is prompt and able to address customer queries in a timely manner.

AI-Driven Lead Prioritisation

This functionality emerged through the suggestions of AI-powered insights being proposed for lead prioritisation. Using AI to study customer data, Viking India can use AI to prioritise leads dependent on their chances of conversion. Factors like customer behaviour, their purchase history, and engagement level can be put forth by the AI to classify leads in the categories of high, medium, and low priority. In doing so, they ensure that the sales team is directing their resources towards the better fulfilling opportunities while not unduly risking time on subpar leads.

Customer Engagement Orders Report - Stakeholders further proposed creating an elaborate report detailing customer engagement orders. This report would allow the sales team to track all customer interactions, sales offer, and follow-ups with real-time updates, thereby making it possible for them to track the advancement of each opportunity. With such detailed reports, the company can ensure that no customer is missed and summon more effortless follow-ups.

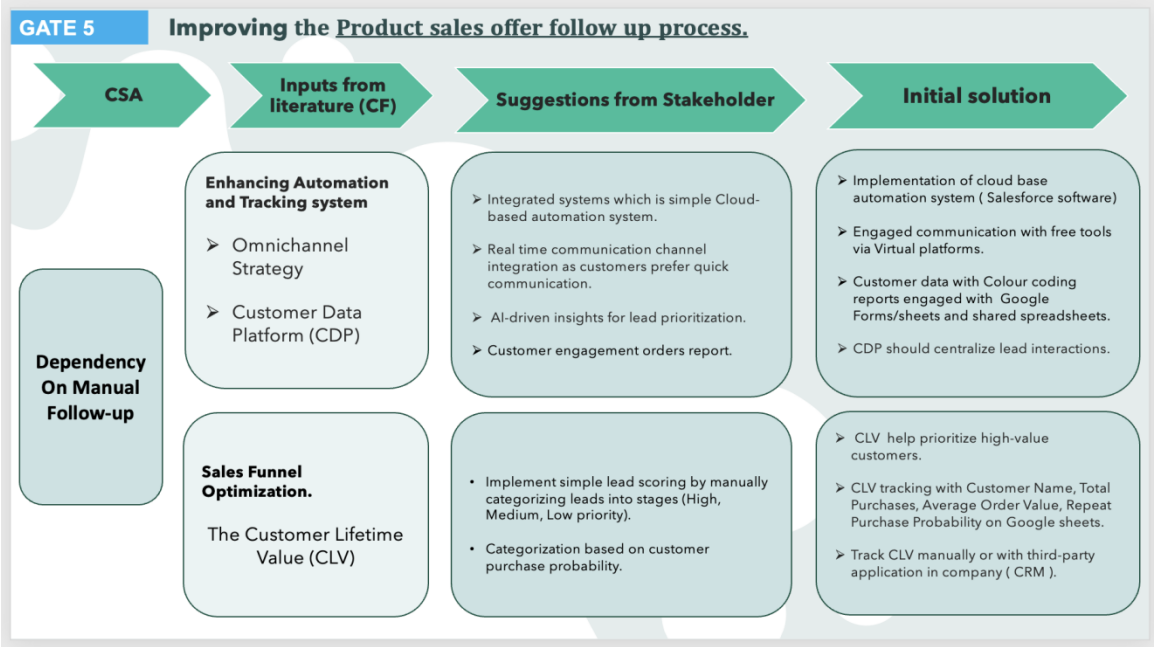


Fig.4 Initial solution for improving the product sales offer follow up process.

Initial Solution

To address the gaps listed above, the follow-up process will be enhanced using automation, integration, and other modern approaches driven by data. The effort in this case is that improvement is sought in the efficiency of follow-ups, the amount of manual effort involved, and the level of customer interaction.

Cloud-Based Automation Systems Implementation: Salesforce

The implementation of a cloud-based automation system, like Salesforce, which automates the sales process and tracks sales offers in real-time as a virtual assistant would, is the first step in the solution framework. Salesforce empowers Viking India to automate numerous activities, which include sending follow-up emails, generating reminders, updating records, and tracking a customer's interaction history. The administrative workload and the issuance of follow-up sales offers will be largely automated. It is also remarkably customisable, pending offer notification automation and escalation of unresolved cases are but two of the myriad company-specific customisations possible.

Engaged Communication with No-Cost Tools:

Stakeholders further recommended the use of costless virtual platforms such as Google Sheets, Google Forms, and shared spreadsheets to help manage

customer data and track sales offers. The sales team would be able to follow up efficiently due to prioritisation enabled by colour-coded reports created through these tools. For instance, the blue colour could represent high-value customers, yellow medium-value customers, and white low-value customers marking them according to where they fall on the value spectrum, thus enabling the team to focus on the more important leads first. Their simplicity and low cost make these tools practical for businesses looking to enhance follow-up management without the need for additional software investments.

CDP Consolidation of Customer Interaction Leads:

Omnichannel customer's interactions can be managed efficiently if customer data is centralised in a Customer Data Platform (CDP). This CDP will become the sole repository for accessing customer data. This will equip the sales team with better insights on leads, thereby improving tracking and controlling efficiencies. The CDP spanning system will be equipped with information regarding custom preferences, custom behaviour, past purchases, and past business relations. This will assist the team in strategically planning follow-ups to improve customer satisfaction. If lead data is streamlined, Viking India will be assured that there are no gaps in servicing the sales area and follow-ups according to the customer's requirements and history will be accurately provided.

Customer CLV Tracking

CLV can be tracked manually or through some other external app linked to the firm's CRM system. The calculations of CLV will assist Viking India in identifying and attending to extreme value customers. For example, the estimation of CLV is vital in deciding who to focus on from among the many prospective customers who have the strongest potential to generate revenue in the long run. The tracking system is supposed to comprise of a customer's name, summary of purchases made, average order size and chances of returning for the transaction again. This information can be hosted on Google Sheets together with other documents or even a CRM system because it enables flexible use which helps in the seamless and unending monitoring of customers’ activities.

Initial solutions proposed in this paper will allow Viking India to considerably enhance the process concerned with product sales offer follow-up. Today communication enables more intelligent automation, and the availability of data over a single interface makes it easier for the sales team to concentrate on the most important prospects. With these improvements the expectation is that the company will have an optimised and efficient workflow which increases customer satisfaction and boosts the conversion rate.

# 6 Feedback Validation of the Proposed Process from Initial to Final Proposal

## 6.1 Overview of this data stage

The development of the proposal from an initial to a final draft is important in validating that any alterations to the product sales offer process automation are reasonable and conform to the actual needs of the sales teams. At this step, the value of the changes is checked, and it is validated whether the solutions will perform as intended in the operations of the organisation.

The draft was based on the implementation of a follow-up automation, customer interaction tracking, and response improvement systems using Salesforce and Google Sheets, which are cloud-based. While the available tools can significantly improve efficiency and customer engagement, perceptions from people who work in the processes need to be collected. This helps determine whether the proposed systems would serve the existing problems in the sales processes.

At the completion of the proposal, Viking India will have been accurately represented because feedback integrated into the final draft guarantees that the changes address practical challenges faced by the business. The refinement will focus on the fine-tuning of the technical operational and integration approaches to the customer’s requirements so that the solutions provided are feasible with the client's frameworks.

Final Stakeholders Suggestion

Based on the valuable stakeholder feedback before the initial presentation, there emerged some practical suggestions which were later incorporated in the final proposal because of their importance. These challenges dealt with real-world limitations such as budgetary resources, technical infrastructure already in place, and team willingness to work with new systems. One piece of feedback that was particularly interesting was the suggestion on not being able to implement a fully scalable and integrated cloud-based solution such as Salesforce because of the associated cost.

Budget Constraints

The stakeholders emphasised that although the potential of percurrent cloud-solution proposed systems integration offered significant value, an implementation for a Viking India subsidiary was, in fact, unaffordable due to the initial outlay. This also shifts the focus toward more creative approaches using more fundamental and easily accessible systems that solve immediate needs, such as using Google Sheets and Google Forms which are free. These tools are, of course, inexpensive and will enable the company to enhance the sales follow-up activities without significant financial burdens.

Quick Response Channels

A different suggestion was made regarding the improvement of the response time. Stakeholders mentioned that any communication enhancements would greatly improve the effectiveness of the follow-ups. As potential for fast communication, real-time engagement tools like WhatsApp or texts were mentioned. The final solution integrates the concept of applying these tools-with-existing Google-based systems-for more efficient follow-ups and quicker response times.

Structured Evaluation Process

Stakeholders also proposed reengineering an evaluation algorithm to assess the follow-up strategy's effectiveness. This would involve simple tracking such as Google Sheets with automated reminders to make sure that sales follow-up tasks are completed within the timelines and leads are not wasted.

All these suggestions show a lack of adequate customisation flexibility within the proposed solutions and illustrate that the system should be operable and easy to use at a low cost in the immediate future. The feedback directs the attentional focus of the solution to readily available and easily implementable accessible resources.

## 6.2 Adjustment to the Initial proposal

From initial to final solution, it incorporates the feedback provided by stakeholders and introduces a more refined approach for improving the product sales offer follow-up process. This solution is designed to be practical, scalable, and cost-effective, while still offering the capabilities needed to address the challenges

faced by the sales team. The final solution includes the following key components.

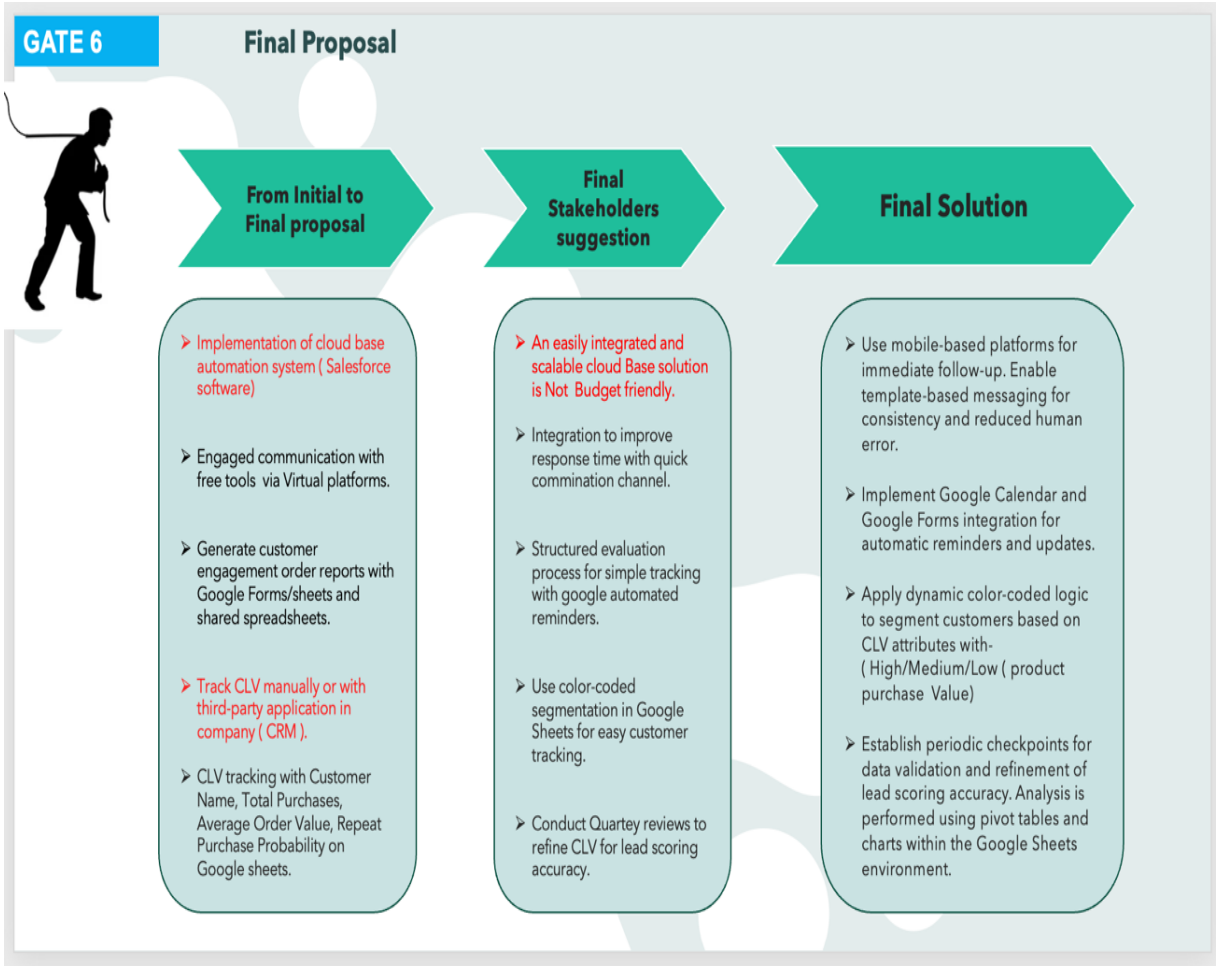


Fig. 5 Final solution

Implementation of Cloud-Based Automation System is not budget friendly and even though Salesforce integration cannot be fully implemented right away due to financial constraints, the end solution will nonetheless focus on the use of cloud-based tools for managing the sales process. Google Sheets and Google Forms are parts of the solution via their integration, which enables tracking of Customer Lifetime Value (CLV) in a low-cost manner and follow-up reminders to be automated. The cloud-based system is the key driver to achieving better customer engagement and follow-up performance tracking that is now primarily sale team-focused, showing which leads are doing well and which need more attention.

The final proposal is a multi-stage approach comprised of implementing the automation system starting with Google Sheets/Forms for local data

management and evolving to more complex tools as the budget permits. The incremental nature of the proposal ensures that the company can begin the sales process improvements without relying on large-scale system implementation.

Engaged Communication via Free Tools

Based on budget matters and suggestions from the stakeholders, the final solution now suggests that the free tools such as Google Sheets be used for sales data tracking and Google Forms to produce reports. These are tools that every non-specialist can easily participate in and are not just limited to a single group that greatly helps in the fast and effective flow of communication. Using these tools, the company can produce customer engagement reports that are comprehensively updated in real-time to keep the sales team alert, dynamic, and ready to go after the most valuable leads.

Free tools like WhatsApp, email, and other digital communication platforms are also part of the solution for ensuring that sales representatives can engage with customers quickly and effectively. These tools will help reduce the time lag between follow-up attempts and customer responses, thus improving the overall speed and efficiency of the sales process.

Customer Engagement Order Reports

The final solution includes the creation of customer engagement order reports that are detailed and generated through Google Sheets. Those will be the reports that not only keep a record of the customer interactions but also trace the order history and follow-up progress besides the sales teams to make some wise decisions by using real data. The reports will also enable the sales team to list down the key performance indicators of their business, such as the Customer Lifetime Value (CLV), which is a function of customer data like total purchases, average order value, and repeat purchase probability.

Such customer engagement reports will provide the sales team with an insight that Kem is the most profitable customer and Ken needs more follow-up. The information showing cumulative purchases and the sales history (trend) offered here can be the driving factors to decide the next step and they can be used for making the visual process in case of high conversion rates.

Tracking CLV Manually or with CRM Integration

In the meantime, Google Sheets will play a key role in the manual tracking of CLV while the company is working on the introduction of sophisticated CRM solutions to the market at a later stage. The manual track system would make it possible for sales teams to rate customer engagement as well as prioritize their work over CLV indicators. This approach will also take care that the salespersons will not be caught up providing service to low-value customers or late-stage customers while they are running after the high-value customers and those who are ready to purchase. In the long term, the company aims to integrate more robust CRM systems for automated CLV tracking, but for now, Google Sheets will suffice. The manual CLV tracking will be supplemented with third-party CRM applications that can be integrated with Google tools to provide more in-depth analytics and automation features.

## 6.3 Final solution for improved product sales follow up process

Pilot Implementation: Customer Colour Coding (CCC)

Perhaps the most distinctive feature of the solution is the pilot implementation of Customer Colour Coding (CCC)

As the name describes, this system class categorises customers using colour-coded sheets in Google Sheets according to their purchasing behaviour, engagement level, and payment history. With the help of the colour-coding system, sales teams can better manage their customers while also speeding up follow-ups, which allows for better customisation.

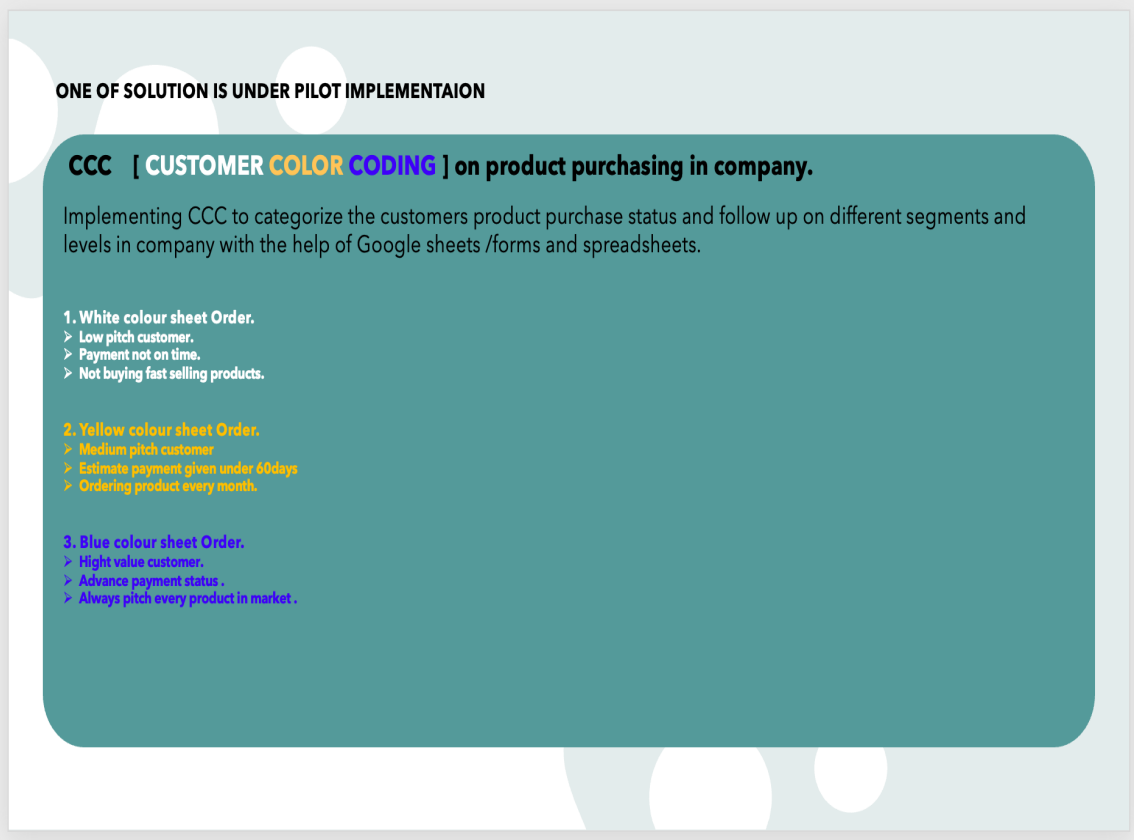


Fig.6 Pilot implementation

**White Sheet Customers:**

These customers are the most problematic to engage with, as they have a notoriously low purchase frequency along with payment-related issues. Perhaps more attention towards these customers would enhance their participation or at least resolve their payment and ordering problems.

**Yellow Colour Sheet Customers:**

Characterised by above-average dependability, these customers represent a medium-value segment. These customers place orders regularly, but unlike high-value clients, they may have longer payment terms and/or less engagement. Though these customers require follow-up, they do not require much attention as those in the white and blue categories.

**Blue Colour Sheet Customers:**

Customers in this classification are very important customers with large purchases and fully paid off payments. These customers are a priority for revenue focus; therefore, they will be targeted for special tailor-made follow-up plans. These customers will also be given great focus to motivate them to remain loyal and expose them to reasons for providing valuable business.

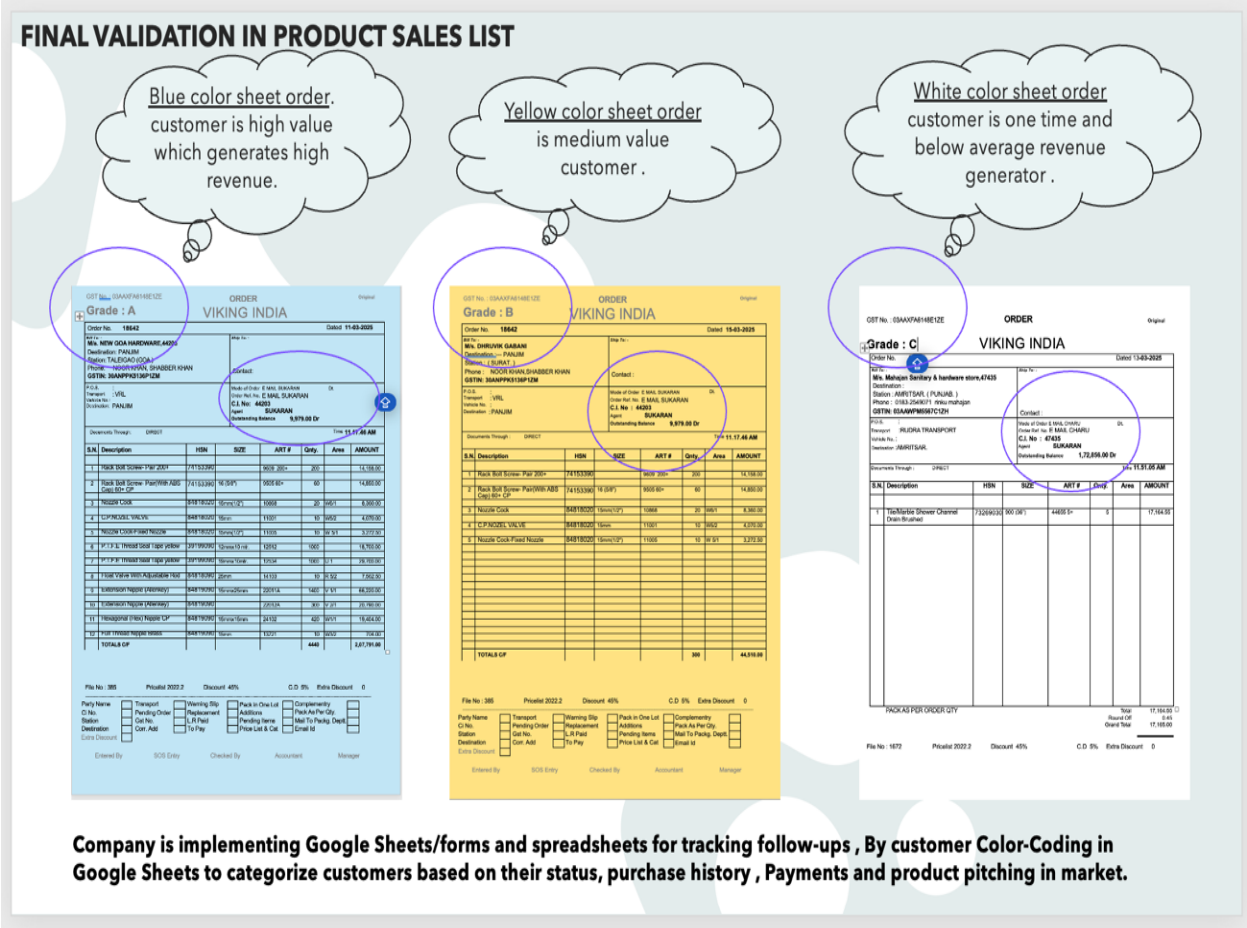


Fig.7 Final purposed validation in company

The implementation of the CCC system through Google Sheets ensures that the sales team can efficiently categorize and track customer engagement. It also provides a clear visual way to prioritize follow-ups and manage customer relationships based on their purchasing behaviour and financial status.

# 7 Conclusions and Reflections

## 7.1 Final Summary of the Thesis

With the case company Viking India in mind, the primary focus of this thesis was to enhance the follow-up process related to product sales offers. The analysis pointed out that the existing processes of the company were still heavily reliant on manual techniques – this inertia culminated in slow reaction times, inconsistent practices, ambiguous delineation of responsibility concerning follow-up activities, and an overall reduction in conversion rates. These issues became especially pronounced in a marketplace where there is intense competition and where personalisation, responsiveness, and customer relationship management practices are critical for maintaining competitive advantages. Addressing these problems in a step-by-step manner, employing a structured gate-based approach, the study progressed from problem identification in Gate 1, through literature review and conceptual framework in Gates 3 and 4, and practical recommendations stakeholder validation in Gates 5 and 6.

### 7.1.1 Alignment with Objectives

The systematic aim of this research was to create a model for process improvement which works in conjunction with the operational realities of Viking India. The intention was to create an effortless, systematised, and scalable solution to the problems associated with the manual follow-up system. This goal was accomplished through the application of the Omnichannel Strategy Theorem, CDP logic, and CLV framework by devising a new follow-up system with these concepts underpinning its architecture. The company and employees had the resources required to implement the solution, which was designed to the company’s requirements. These included the construction of a streamlined follow-up tracker on Google Sheets and Forms that allowed team members to update and work on the document simultaneously. Moreover, a visual tiering classification system based on the colour code logic was proposed. This method facilitated customer segmentation by priority level and allowed for better strategic

targeting by the sales teams: blue for high-priority clients, yellow for medium-level customers, and white for low-value leads.

### 7.1.2 Research Outcomes and Business Impact

As a result of this research, a new follow-up process was developed and piloted which measurably improved response times, sales coordination, and customer engagement. Viking India experienced improved visibility of sales interactions and a reduced likelihood of losing customers due to miscommunication or neglect after switching from manual tracking to a shared digital system. In particular, the CCC model streamlined customer segmentation and allowed the sales team to quickly identify and give more attention to high-value clients. Incorporating CLV principles with the manual tracking system also allowed the company to gradually form a framework for more informed decision-making. The feedback from the pilot testing phase shows that sales personnel found the system useful, usable, and relevant to their workflows and adaptable to their existing systems. The solutions provided through this thesis, while not fully automated, highlighted feasibility and immediate impact that was appreciated despite automation being a long-term goal.

### 7.1.3 Reflections on the Project Process

This thesis reflection has been holistic in nature, perhaps because practical action research was useful in addressing operational concerns. The stakeholder engagement at every level contributed towards developing a solution that was feasible from even the most practical perspectives as opposed to just theoretical. It also became clear through this thesis that even the simplest of solutions, if integrated strategically, can result in profound change. For instance, CCC was widely adopted because it enabled virtually effortless communication and decision-making owing to its graphic representation. Along the way, however, other challenges also emerged. A major one was the limited scope of the pilot phase, which had only one region. In addition, the system incorporating CLV tracking was still exposed to inaccuracy and sustainability issues given the reliance on manual data entry and data storage in Google Sheets. These aspects

highlight the need for additional refinement, including more extensive, gradually increasing, automated system integrations.

## 7.2 Final Summary of the Thesis

This thesis takes into consideration both the practical world and theoretical frameworks, highlighting an equilibrium from a practical as well as academic viewpoint. It complied with a research procedure which consisted of phases of data harvesting, literature review, proposal drafting, and validation with stakeholder input. Applying academic constructs such as CLV, CDP, and the Omnichannel Strategy not only improved the analytical depth of the study but also contributed to building a scalable and flexible solution. The methodology was credible because it combined many data sources: interviews, feedback workshops, document review, and pilot testing. With these multiple layers of validation, the endorsed enhancements were grounded in actual experiences of the sales staff at Viking India. Despite the constraints posed by the scope of implementation and the short timeframe, the project is credible within its strategic methodological triangulation, stakeholder participation, and business alignment.

### 7.2.1 Final Thoughts and Future Scope

This thesis has shown that practical and well-directed approaches can create significant change, even in highly constrained environments. The improvement of the product sales offer follow-up process at Viking India is a case example of how systematised thinking, sophisticated literature, and real-world knowledge can achieve drastic process changes with simple and affordable approaches. In this regard, the company is advised to reproduce the proposed model at all operational regions to homogenise its follow-up procedures. There is also room for development in the data-tracking tools by transforming them into a more sophisticated CRM system, which would enable the automation of CLV calculations, integrated dashboards, and sophisticated customer behaviour analytics. Additional changes could be the creation of formal review loops for continuous process improvement, evaluation of customer feedback for follow-up approaches, and incorporating customer feedback into the follow-up strategies.

In essence, this thesis is a contribution towards a more long-term advancement of a data-driven and customer sales culture and, more importantly, assists Viking India in maintaining consistent and scalable growth within their industry and competitive landscape.

## 7.3 Closing words

This thesis demonstrate that process improvement does not always require complex or expensive systems. By focusing on the core weakness manual dependency in the sales follow up process and applying practical and data driven solution like google sheets, WhatsApp, and customer lifetime value, Viking India can now follow more consistently reduce errors and enhance customer relationship. These small yet strategic changes can deliver measurable business values, setting foundation for saleable growth. The success of this project lies in its balance between simplicity, practicality, and academic rigour, proving that meaningful impact is achievable with focused intent and structured methodology.

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# Appendices

## Appendix A

Survey Questionnaire for Data Collection

To support the current state analysis (CSA), a structured survey was designed to gather first-hand insights from sales and service personnel. This survey aimed to identify the real challenges experienced in the product sales offer follow-up process.

Sample Survey Questions:

1. How do you currently track and manage follow-ups after submitting a sales offer?
2. What tools (if any) are used for recording and monitoring customer communication?
3. How frequently are sales offers followed up on average?
4. What are the major obstacles that prevent timely follow-up?
5. In your opinion, what improvements could make the follow-up process more efficient and reliable?

The survey was conducted among five stakeholders across sales, service, and operations roles via online meetings and shared forms.

## Appendix B

Interview Guide for Key Stakeholders

Semi-structured interviews were carried out to obtain deeper insights into the operational challenges, and to validate the survey findings. The following questions were used as a guide:

Key Interview Questions:

1. What are the most common reasons for missed or delayed follow-ups?
2. How do you ensure that no lead is forgotten or overlooked?
3. What is your experience with using tools like Google Sheets, WhatsApp, or Excel?
4. How do you think automation could improve follow-up tasks?
5. Are there existing communication gaps between departments that affect sales?

Participants included area sales managers, key account managers, order handling specialists, and product engineers. The interviews were recorded with permission for analysis.

## Appendix C

Tools Proposed for Sales Follow-up Enhancement

Based on stakeholder feedback and limitations of the current system, the following low-cost digital tools were suggested for improving the follow-up process.

These tools require no new financial investment and are user-friendly for the Field

Observations and Process Gaps

| Tool | / Application | / Justification |
|---|---|---|
| WhatsApp | / Quick messaging for reminders and updates | / Already widely used and accessible |
| SMS Services | / Reminder messages for follow-ups | / Fast communication; works without internet |
| Google Sheets | / Tracking customer interactions and follow-ups | / Shared, real-time visibility across teams |
| Google Forms | / Collecting sales feedback and customer inputs | / Easy data collection and documentation |

## Appendix D

During interviews and analysis, several key challenges were identified in the existing follow-up process:

Manual follow-up tracking often resulted in human error and data loss.

There was no unified system to monitor which offers had been followed up.

Delays in response time reduced the likelihood of successful order closure.

Teams lacked real-time visibility of customer status or priority levels.

No structured reporting existed to evaluate sales engagement or performance

## Appendix E

Key Frameworks Used in the Thesis

The following academic and industry-recognised frameworks supported the design of the proposed solution:

1. Omnichannel Strategy – Ensures unified communication across WhatsApp, SMS, email, and live chat.
2. Customer Data Platform (CDP) – Centralizes customer data for better follow-up insights and personalization.
3. Customer Lifetime Value (CLV) Framework – Prioritizes high-value customers to enhance revenue and retention.

These models formed the backbone of the Conceptual Framework (Chapter 4) and were directly linked to the proposed solutions in Chapters 5 and 6.