Targeting improved user experience in KONE CRM opportunities management

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Abstract
The primary objective of this study is to enquire about potential elements for simplification and further enhancements of KONE CRM opportunities tab layout, and overall opportunity management at KONE, as means to improve users' experience, foster adoption and increase levels of sales efficiency across KONE CRM users globally.

This study´s theoretical framework highlights the contributions of authors like *Adrian Payne (2008)* and *Ed Peelen (2005)* in what concerns to the *concept and strategic framework of CRM*; for the analysis, the author resources to the *Human-Computer Interaction (HCI) framework, the User-Center Design, the Human-Centered Software Engineering (HCSE) design* and concepts like *Usability* and *User Experience*. On *HCSE*, it is prominent the work of *Seffah et al. (2005)*, while in terms of *User Experience (UX)*, stand out the contributions of authors like *Hassenzahl, M (2003)* and *Roto, V. et al (2011)*.

In terms of implementation, this study is conducted in the form of *applied action research* with a mainly *qualitative approach*. Data was collected through *10 telephone interviews* and a *face-to-face focus group discussion* with sales executives and sales managers from various KONE locations globally. And data was coded and analyzed mainly through the *color-coding technique*, the *world cloud* and the *affinity diagram methodology*.

The findings of this study reaffirm the importance of developing a simplified KONE CRM user interface and the need for better synchronization between KONE CRM and other KONE systems like SAP.

In conclusion, the study served as a forum for exchange of ideas, consultation and validation among KONE CRM user community on potential future enhancements to the platform, and overall opportunity management at KONE. As an outcome of the study, the author recommends to maximize corporate efforts to improve usability and user experience; improve change management and communication practices; place higher focus on training and documentation and; regularly and systematically share best practices and reward good behaviour throughout KONE CRM´s lifecycle.

Key words
Customer Relationship Management (CRM), Sales Funnel, Opportunity Management, Human-Computer Interaction (HCI), User-Centered Design (UCD), Human-Centered Software Engineering (HCSE), Usability, User Experience (UX)

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1 Introduction

This study is prepared in the form of a development project for KONE Corporation, sponsor of this work. Upon its successful completion, the author intends to graduate from the MBA programme in International Business Management (from now on referred as IBMA) at HAAGA-HELIA University of Applied Sciences.

KONE utilizes a Customer Relationship Management tool (from here on referred as KONE CRM) to follow-up and monitor its customer related activities globally. The primary aim of this study is to enquire about potential elements for simplification and further enhancements of KONE CRM (based on salesforce.com) to improve users' experience and increase levels of adoption and sales efficiency across KONE CRM users globally. The scope of this study covers one of the current areas of concern within the tool urging further improvements: the opportunities section of the sales cloud.

The target group of this study is a selected group of sales representatives and sales managers across KONE offices globally, with whom the student works closely to collect feedback and potential areas for further improvements to be taken on board by KONE's Global CRM team, based in Espoo, Finland. The author is not working for the team, but has been given the opportunity to prepare her thesis project as an outside researcher. This study is a continuation of a previous work carried out in 2012 by KONE's CRM Solution Owner and tutor of this thesis project, Caroline Bondier, on the *"Evaluation of the KONE CRM tool and recommendations to facilitate and harmonize its usage and perceptions by the sales people"* (Bondier 2012).

Throughout the study, the author intends to deepen in the analysis of KONE CRM opportunities tab and overall opportunity management at KONE to identify areas of improvement to enable sales people to better focus on serving their customers. The student will utilize mainly qualitative research methods to conduct her study and upon its completion is expected to formulate an action plan with concrete steps. These steps are expected to translate the improved user experience into better use of the system and higher adoption, and the higher sales efficiency into more profitability for KONE.

1.1   KONE organizational context

KONE is one of the global leaders in the elevator and escalator industry. Founded in 1910, the company provides industry-leading elevators, escalators and innovative solutions for modernization and maintenance. In 2014, KONE had annual net sales of EUR 7334 millions (5.8% increase compared to 2013), and employed 47064 employees globally (KONE Corporation 2014). KONE's class B shares are listed on the NASDAQ OMX Helsinki Ltd (KONE Corporation 2013a).

KONE's key customers are builders, building owners, facility managers, and developers, and its main segments are residential buildings, hotels, office & retail buildings, infrastructure, and medical buildings. The company also serves special buildings such us leisure and education centres, industrial properties, and ships. KONE serves hundreds of thousands of customers across the globe, the majority of which are maintenance customers ranging from small facility management companies serving a single building, to large global retail or hotel chains (KONE Corporation 2013a).
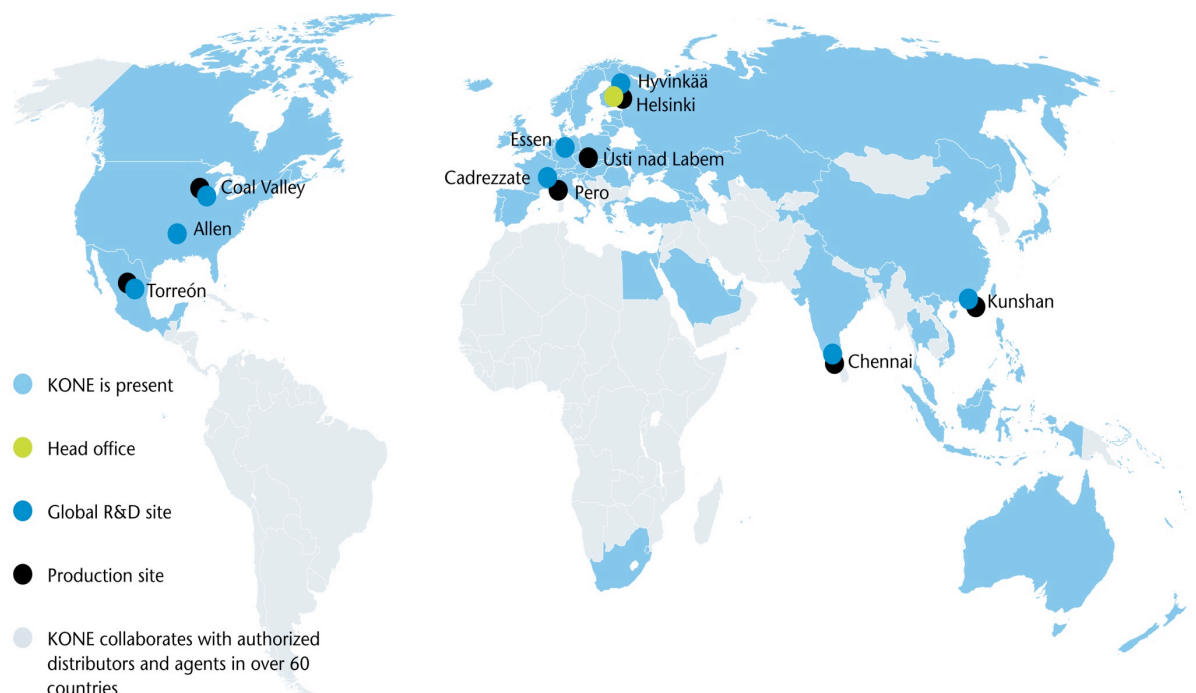
Figure 1. KONE´s presence worldwide (KONE Corporation 2010)

KONE operates in more than 1,000 offices in approximately 50 countries all over the world. It has seven global production sites located in its main markets, as well as eight global R&D centres, and authorized distributors in over 60 countries. KONE head of-

fice is located in Helsinki, Finland. Figure 1 shows KONE's presence worldwide (KONE Corporation 2013a).

KONE's vision is to create the best *People Flow®* experience, which implies enabling people to move smoothly, safely, comfortably, and without waiting in and between buildings. Its strategy is oriented to deliver performance to customers by creating the best user experience with innovative *People Flow®* solutions and striving to expand the understanding of its customers' needs to achieve its four strategic targets: *serving increasingly loyal customers, making KONE a great place to work, leading the industry in profitable growth, and providing the best user experience* (KONE Corporation 2013b).

Figure 2. Turning strategy into reality (KONE Corporation 2015)

As shown in figure 2, KONE's efforts to achieve its strategic targets are supported by development programmes that together with its vision and core values define the company's way of turning strategy into reality.

1.2   KONE CRM context

KONE Way is the term used to define KONE's way of doing business in the relationship with its customers, the delivery of its products and services, the maintenance of elevators, escalators and auto walks, the creation of new solutions and the management and support of these processes. The aim of KONE Way is to help KONE become a truly global company, delivering a consistent experience to customers all around the world. Implementing KONE Way globally implies removing overlaps in different process areas as a way to improve productivity, clarify responsibilities, and emphasize collaboration between different business functions (KONE Intranet 2013).

KONE Way is supported by 5 core processes, or so-called KONE Way core processes, which define the way KONE does business at different levels. These together aim at driving KONE's future success (KONE Intranet 2013):

- *Customer* (i.e. sales and marketing related processes)
- *Delivery* (i.e. sourcing, delivery chain & installation)
- *Maintenance* (i.e maintenance operations & spare parts management)
- *Solution Creation* (i.e. research and development related processes)
- *Management & Support* (i.e. company management and support processes)

KONE Way processes and solutions are continuously being implemented in the business units through key projects or so-called KONE Way Projects. KONE Way Projects focus on developing and implementing globally harmonized solutions to the business units. These solutions are comprehensive terms covering not only the platform and applications being implemented, but also all the business processes, support and operations capabilities involved. Therefore, KONE Way projects simultaneously introduce new business tools and globally harmonized ways of working.

KONE CRM is an example of KONE Way solutions falling under the *Customer* core process and is a key enabler of KONE customer focus. This project was started to set up and implement a tool that would facilitate sales person's daily work, planning and following-up of opportunities, customer information and sales activities. It was also intended to provide Sales Management with an instrument to coach their sales people for

better results, to improve sales efficiency, and to establish a systematic sales approach to allow more time to meet customers. A global CRM tool was needed to manage both global and local sales funnels (KONE Intranet 2013).

KONE CRM is used by over 5000 salespeople, sales support staff, and marketers across all KONE countries. The tool was piloted in 2006, and launched in 2007, and today is widely used throughout all levels of the organization from Directors to Front Line Sales and Credit Controllers. KONE CRM is built on Salesforce.com, a cloud-computing platform used by many leading companies in the world. It offers online access to customer account and contact records, with real-time information and tools for managing sales opportunities. It is used as a strategy to improve KONE's visibility globally, and as a result allows the organization to build stronger customer relationships that can translate in closed deals (KONE Intranet 2013).

Maintaining up-to-date information in KONE CRM is of high importance because it acts as central storage and back-up, and it allows KONE sales organization to look after their customer relationships in a more efficient and timely matter even during salespeople' sickness, holidays or responsibility changes in the organization. Besides, it enables 24/7 access to customer data, regardless of where you are, and only dependant of an Internet connection.

The following section is dedicated to outline the key drivers and main objectives motivating this development project. They serve as roadmap and guidance to keep the various project phases within scope, and to determine whether the project´s expected benefits are realised.

2   Research key drivers

This study is a continuation of a previous MBA thesis work carried out in 2012 by KONE CRM Solution Owner and tutor of this thesis project. In her study, Bondier (2012) focused on understanding how sales representatives use and perceive KONE CRM, as basis to define a set of actions and recommendations to help optimizing the benefits realization of KONE CRM for both, end-users and KONE as a company. Her study had a global scope and focused on looking at KONE CRM as a whole, evaluating potential areas for further improvements to harmonize its usage and perceptions by the sales people (Bondier 2012). This study, on the other hand, has a narrowed down scope as described below:

2.1   Research scope and objectives

This study aims at focusing on one specific area of concern within KONE CRM: the management of opportunities. Therefore, the attention will be focused on exploring potential areas for further developments and simplification of KONE CRM opportunities tab layout (see figure 3), which has earlier been considered to be one of the most time-consuming areas to be filled in, and to have either useless or redundant information. Through this project the author aims at exploring ways to reduce administrative burden for sales people and enable them to better maintain and extract current and accurate data to manage the sales process. This all with the ultimate purpose of allowing them to dedicate more time to serve their customers and generate even higher levels of adoption of KONE CRM and users support to embrace future changes within the tool. Besides, this study is also an opportunity to look back into those areas previously identified by the KONE CRM user community as requiring further attention or improvements, and define whether they remain or not valid and relevant for our customer base today.

In a nutshell, these potential areas for further development and simplification of the opportunities tab layout and overall opportunity management at KONE are the key drivers of this research project, and also the main justification for KONE Global CRM

Team to support it. Here it is important to mention that this thesis topic was recommended by the sponsor company given their interest in exploring further around this area, identifying key issues needing their attention and efforts, and defining a strategy to address the main challenges. Consequently, *the main objective of this research is gathering input on the opportunities tab and overall KONE opportunities management as means to improve users' experience, foster adoption, and facilitate overall sales efficiency across KONE CRM users globally.*
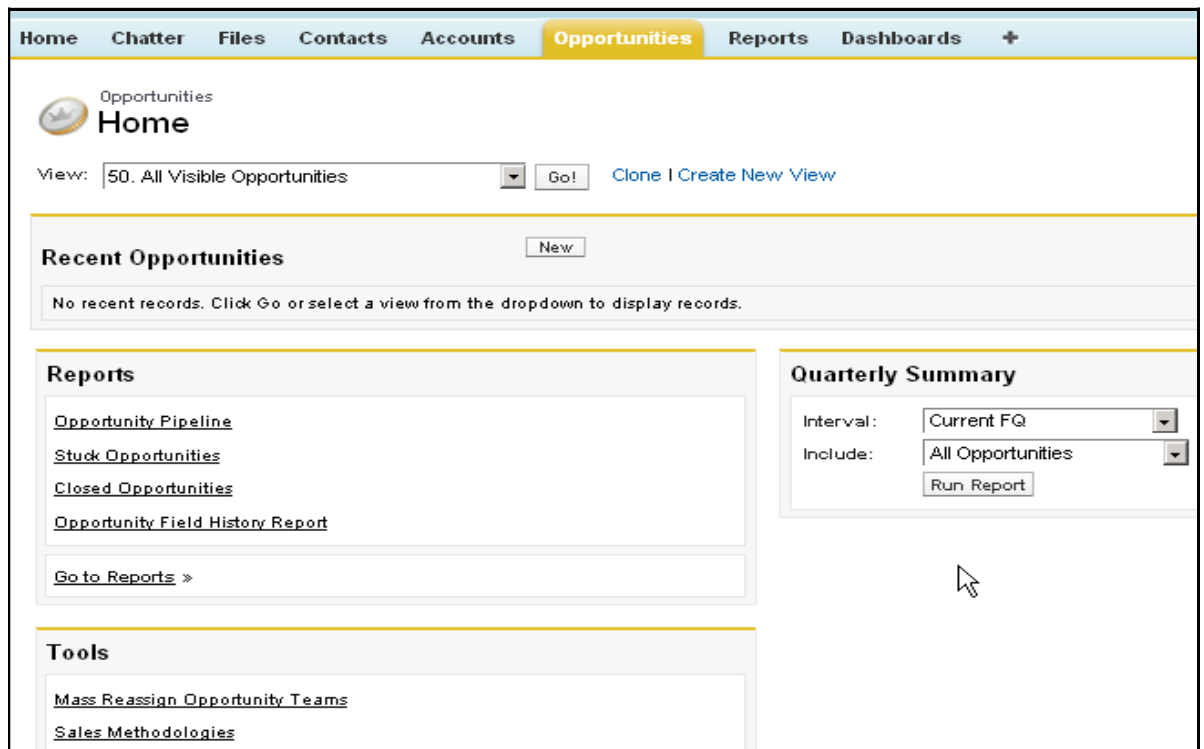
Figure 3. Home section of KONE CRM opportunities tab (KONE CRM 2013)

It is important to clarify that, in the scope of this study, potential elements for simplification of KONE CRM opportunities section will only be considered if not jeopardizing the quality of the sales management process or the customer service approach. Besides, it is also important to remind that as a global tool, any possible future enhancements in this section will affect KONE CRM users globally. Therefore, any potential requirement gaps that may exist at the local level should be handled carefully before any simplification proposals are made and decided upon.

This study also aims at serving as a forum for exchange of ideas, consultation and validation among KONE CRM end users on potential future enhancements to the tool. It

is targeted to serve as a community for involving end users and embracing their opinions and ideas through a bottom-up approach, where the author intends to serve as the bridge between users and KONE CRM management. The author believes that this can contribute to inspire users, get them engaged and motivated to future developments of the tool, and can help KONE Global CRM team to make more allies when there is a clear shared commitment for success.

This is a common feature in project methodologies like *Agile*, where involving team members in the planning and design of project plans has proven to increase their engagement, motivation and productivity within projects. Besides, as stated by Gentle in his CRM Project Management Handbook, "key projects like CRM hardly ever fail because of a critical mass of opposition; they fail because of a lack of allies" (Gentle 2002, 150). Thus, this project hopes to be a good exercise to put ourselves in others' shoes and reduce the gaps between wanted vs. needed and possible vs. priority to set a workable action plan with realistic priorities.

Finally, the value contribution of the findings of this study is to serve as input to develop an action plan, with concrete steps and recommendations for potential simplifications and/or further enhancements into the opportunities tab and overall KONE opportunity management practices. This plan is expected to serve as input to build future versions of the KONE CRM roadmap depending on the level of complexity and the requirements for the proposed actions to be realised. Enhancements to KONE CRM are released two times a year, and many of the best improvements implemented are suggested by end users. Consequently, this study is also expected to serve as input for future releases of KONE CRM. Here it is important to clarify that this plan is just a suggested way of action, but its potential implementation will be determined by KONE Global CRM team at a later stage and remains outside the scope of this report.

2.2 Research question

The research question is: *What simplifications and further enhancements are needed into KONE CRM opportunities tab and overall, on KONE opportunities management, to improve users´ experience, foster adoption and increase overall sales efficiency at KONE*?

To answer to this question, the following issues are further explored:

a) What are the main areas of concern raised by end users when creating and maintaining opportunities in KONE CRM?

b) Which simplifications or further enhancements could be made in the opportunities tab and overall opportunities management that could positively trigger user experience and foster adoption of KONE CRM?

c) How feasible are the simplifications and enhancements identified above? Which ones should be treated as priority, which ones could be postponed, and which ones can't be implemented in the current situation and why?

2.3 Research plan and schedule

As stated in HAAGA-HELIA's Master thesis guide, the Master's thesis is a 30 ECTS assignment with an estimated workload of 810 hours (HAAGA-HELIA 2011, 4). In this chapter, the major checkpoints or milestones for the thesis project are defined together with an estimate of the approximate workload in hours required for each stage to be completed. This Master Thesis' research process will follow the approach suggested by Saunders et al. (2009, 11).

Firstly, the key drivers of the study are defined together with the research methodology and approach, supported by a careful review of the literature that will enable the author to better understand the context of her study, and review what has been said in previous studies about her research topic or related to it. In parallel, appendix 1 is dedicated to list all acronyms mentioned throughout this thesis project to facilitate its reading. Secondly, data is collected in the form of semi-structured qualitative interviews *(phase 1)* and a focus group *(phase 2)* and analysed through mainly qualitative methods *(e.g. colour coding*

& world cloud, and affinity diagram respectively). An online quantitative questionnaire is also conducted prior to each phase to gain some insight of the interviewees in preparation for those. Action research is conducted throughout the whole research project. Finally, based on the data collected, the final thesis report is prepared and main outcomes and possible development propositions presented at KONE to establish the grounds for the implementation and next steps. Once the final thesis report is approved, it is published in various web portals to make it accessible to other students or anybody else interested in the topic. Based on this, table 1 presents the key milestones of this study. For each of them, the major steps/objectives, deadline and estimated workload in hours is defined:

Table 1. Key research milestones

Milestones	Major steps/objectives	Deadline	Estimated workload in hours	Status
Thesis plan prepared and sub-mitted, and Thesis Su-pervisor assigned	Formulate & clarify research topic	30th Sept 2013	150 hours	Completed
	Establish needs & objectives			Completed
	Formulate research problem			Completed
	Define thesis methodology and identify potential relevant theories			Completed
	Establish preliminary schedule			Completed
	Identify potential resources and risks			Completed
	Thesis plan submitted for approval	7th Oct 2013		Completed
	Thesis plan approved and Thesis Supervisor assigned	31st Oct 2013		Completed
Data collection & analysis: Part 1 of	Interview protocol presented and approved, and interviews scheduled (invitations sent out)	29th Nov 2013	200 hours	Completed
	One-to-one qualitative inter-	28th Feb		Completed

Milestones	Major steps/objectives	Deadline	Estimated workload in hours	Status
qualitative method conducted (one-to-one qualitative interviews)	views conducted	2014		
	Transcripts of first round of interviews completed, results coded and presented at KONE, and main themes for post focus group discussion identified	29th Aug 2014		Completed
Literature Review finalized	Complete literature review section	31th Oct 2015	60 hours	Completed
Data collection & analysis: Part 2 of qualitative method conducted (post focus group discussion)	Structure and agenda for post focus group discussion prepared and agreed upon with moderator and sponsor company	17th Oct 2014	200 hours	Completed
	List of participants for part 2 agreed upon and session scheduled (invitations sent out)	17th Oct 2014		Completed
	Post focus group discussion conducted	14th Nov 2014		Completed
	Outcome of post focus group discussion summarized and coded	12th Oct 2015		Completed
	List of concrete actions and priorities proposed by users compiled and presented at KONE, and their implementation status and feasibility dis-	20th Nov 2015		Completed

Milestones	Major steps/objectives	Deadline	Estimated workload in hours	Status
	cussed and recorded in the final report			
Thesis project report finalized and thesis presentation conducted	Submit first final thesis draft	23rd Nov 2015	200 hours	Completed
	Review supervisors' comments, discuss improvements and submit updated thesis version	27th Nov 2015		Completed
	Submit final version for approval	27th Nov 2015		Completed
	Complete Maturity Exam	4th Dec 2015		Completed

Each milestone presented in table 1 is assessed through either telephone/Skype discussions or e-mail exchange with both, the KONE sponsor and the Thesis Supervisor at HAAGA-HELIA. Here it is important to mention that "the reason for choosing to proceed by milestones is that they define particularly important events in the study process where progress is reviewed and assessed. Also during milestones meetings, the feasibility of the project is reviewed and next steps are defined. The milestones meetings are very important in maintaining the motivation as the project progresses" (Bondier 2012, 6).

In terms of implementation, the outcome of this thesis project is presented to all relevant KONE stakeholders within key milestones as well as at the end of the study, where a set of development proposals are drawn to their attention and further evaluation. These development proposals are presented in the form of concrete recommendations, which after their careful assessment are expected to serve as input for the design of future versions of the KONE CRM roadmap and for forthcoming releases of KONE CRM and to drive, overall, future strategy around CRM development.

3 Literature review

As stated by Saunders et al. (2009), "a critical review of the literature is necessary to help you develop a thorough understanding of, and insight into, previous research that relates to your research question(s) and objectives. Your review will set your research in context by critically discussing and referencing work that has already been undertaken, drawing out key points and presenting them in a logically argued way, and highlighting those areas where you will provide fresh insights. It will lead the reader into subsequent sections of your project report" (Saunders et al. 2009, 98). Therefore, this section is an effort to summarize the key concepts, theories and frameworks used as basis to develop this study project. They are of pivotal importance because, for one side, help to better understand the context and the complexities surrounding the research problem, and for the other, support the knowledge creation process crucial for the success of a work of this nature.

3.1 Defining CRM

Customer Relationship Management (CRM) is a concept dating back from late 1990s and early years of the 21st century that emerged as the so-called next wave of marketing, making its traditional tools and techniques obsolete. CRM´s automated approaches to manage customer relationships were believed could enable any company to sell anything to anyone and solve any marketing challenge. It was believed it would be just about installing a software, loading the customer data, and sit back and see the benefits rolling. But reality was far apart, and this early misconceptions on CRM systems' capabilities cost companies huge investments without tangible return on investment. In those times the focus was all in the software, but there was no a well-structured and organization-wide process in place, nor supportive and enthusiastic people driving the changes and ensuring approaches were understood and well implemented across organizations. Today, the lessons learned from those early years have made CRM emerge into a topic of major importance in business life, driving companies' strategy and management approach (Payne 2008).

Several definitions of CRM have emerged since its origins, some ranging from CRM seen as a particular technology or IT solution, to those establishing it as a strategic approach. According to Payne (2008), the lack of clarity around the concept of CRM often leads to use it interchangeably with terms like *relationship marketing, customer relationship marketing (ERM), technology enabled relationship marketing (TERM), customer managed relationships (CMR), customer management (CM)* and other related CRM terminology, and the term is used differently across different industries and markets. Therefore, for the purposes of this study, CRM is understood *as a strategic approach* to business as per Adrian Payne´s definition (Payne 2008).

In words of Payne (2008), CRM is defined as "*a strategic approach concerned with creating improved shareholder value through the development of appropriate relationships with key customers and customer segments. CRM unites the potential of IT and relationship marketing strategies to deliver profitable, long-term relationships. Importantly, CRM provides enhance opportunities to use data and information both to understand customers and implement relationship marketing strategies better. This requires a cross-functional integration of people, operations, processes and marketing capabilities that is enabled through information, technology and applications*" (Payne 2008, 22-23). In a nutshell, "*CRM, viewed from a strategic perspective, is concerned with how the organization can create increased shareholder value through developing superior customer relationships*" (Payne 2008, 20).

Peelen (2005) further elaborates on the concept of CRM as a strategic approach stating that "it is preferable for CRM to be regarded as a business strategy from the start, one that is aimed towards developing long-term, mutually profitable, individual customer-supplier relationships and is based on an IT infrastructure to be developed, one that enables well-defined and controlled processes, and places capable personnel in a position to function optimally" (Peelen 2005, 6). This is aligned with Payne´s premise that "if there is no benefit to the customer, there can be no benefit to the company. If there is no value created for the customer, there can be no on-going value created for the marketing organization. CRM is a reciprocal process. There must be benefits to both parties for CRM to be successful" (Payne 2008, xiv).

Helping the sponsor company to realise the benefits of both, its customers (in this context its users) and the organization itself around the potential and capabilities of KONE

CRM, is one of the main drivers of this thesis project. Further exploring ways to enhance KONE CRM´s opportunities tab layout and overall opportunity management at KONE is one of many ongoing efforts lead by the KONE Global CRM Team to support the realisation of a common goal: allowing KONE CRM´s overall vision, set objectives and overall benefits to be realised throughout the system´s lifecycle.

3.2   The CRM Strategic Framework

Payne (2008) emphasizes that successful CRM requires a cross-functional approach involving not only marketing but the whole organization. Developing a cross-functional approach to CRM involves defining first the key processes to be addressed, and second identifying the key issues and questions to be tackled by the organization for each of these processes. Consequently, he defines "five key cross-functional CRM processes that need to be considered by most organizations. These are" (Payne 2008, 29):

- the strategy development process
- the value creation process
- the multi-channel integration process
- the information management process
- the performance assessment process

Figure 4 presents Payne´s proposal for a CRM strategic framework incorporating the above-mentioned five cross-functional processes. These processes are the result of intensive research conducted by him with business executives from a wide range of industries. According to Payne, "CRM should be viewed as a strategic set of processes or activities that commences with a detailed review of an organization´s strategy *(the strategy development process)* and concludes with an improvement in business results and increased shareholder value *(the performance assessment process)*. The belief that competitive advantage stems from the creation of value for the customers and for the company *(the value creation process)* is key to the success of any relationship. CRM activities for all substantial companies will involve collecting and intelligently utilizing customer and other relevant data *(the information management process)* to build a superior customer experience at each touch-

point where the customer and supplier interact *(the multi-channel integration process)"* (Payne 2008, 29).
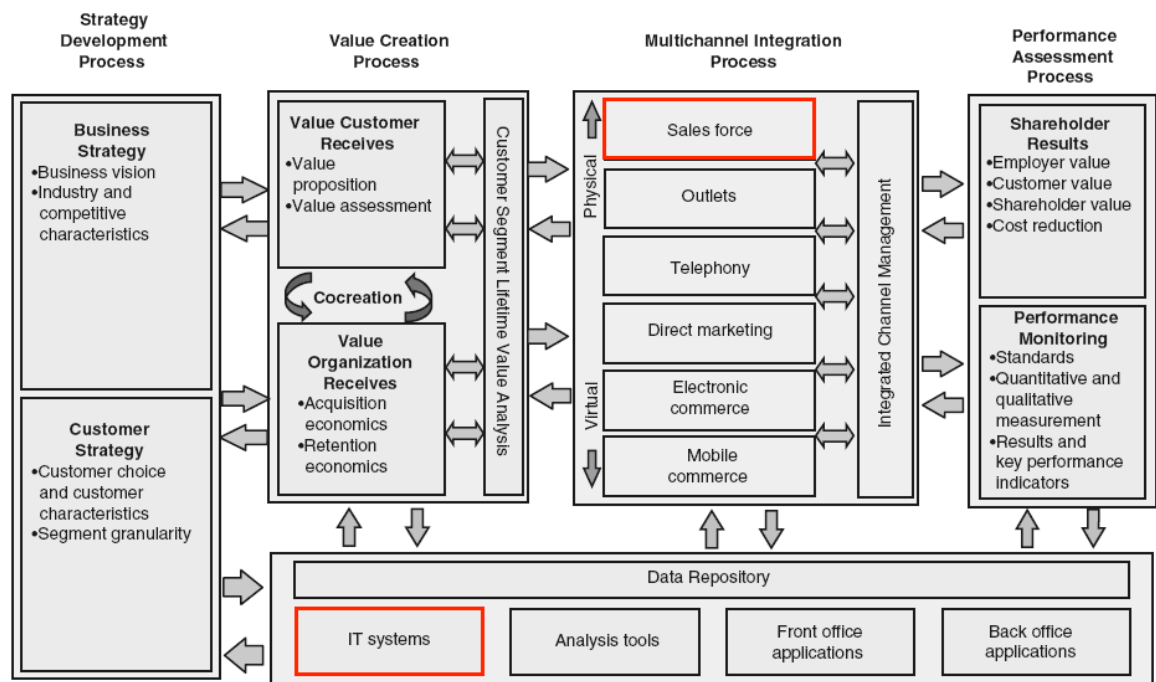

Figure 4. The strategic framework for CRM (Payne 2008, 31)

The value contribution of this framework is embedded in its premise that these five processes collectively can produce greater impact to overall organizational prosperity than they can do individually. Hence, they should be established as a set of integrated and iterative activities that, if managed effectively, can result into improved shareholder value (Payne 2008). Subsequently, this framework is regarded as relevant for the development of this study project because, if followed conscientiously, can empower organizations to identify and address those CRM issues preventing them from achieving higher levels of performance. Figure 5, for instance, lists some of the key questions that organizations should be asking themselves in each of these five processes according to Payne (2008). Breaking down CRM into various manageable processes not only helps in communicating easier its strategic purpose, but also in demonstrating the interdependencies and cross functionality of CRM activities (Payne 2008).

> **Process 1: the strategy development process**
>
> - Where are we and what do we want to achieve?
> - Who are the customers that we want and how should we segment them?
>
> **Process 2: the value creation process**
>
> - How should we deliver value to our customers?
> - How should we maximize the lifetime value of the customers we want?
>
> **Process 3: the multi-channel integration process**
>
> - What are the best ways for us to get customers and for customers to get to us?
> - What does an outstanding customer experience, deliverable at an affordable cost, look like?
>
> **Process 4: the information management process**
>
> - How should we organize information on customers?
> - How can we ´replicate´ the mind of customers and use this to improve our CRM activities?
>
> **Process 5: the performance assessment process**
>
> - How can we create increased profits and shareholder value?
> - How should we set standards, develop metrics, measure our results and improve our performance?

Figure 5. CRM Strategic Framework Questions (Adapted from Payne 2008, 32-33)

This study is in itself an effort to put into practice some of the main principles of Payne´s CRM strategic framework: firstly, the author familiarizes herself with the context and functionality of KONE CRM and the key elements driving the sponsor company´s strategy around KONE CRM development *(the strategy development process)*. This is followed by the definition of the study's scope and objectives, research methodology and data collection and data analysis techniques. Those are the means used by the author to explore ways to deliver and maximize the lifetime value of the tool for the KONE CRM user community *(the value creation process)*. The qualitative interviews and the post focus group discussion are the main sources of information to understand the research problem and define key areas of concern to be addressed *(the information management process)*. Involving end users in all phases of the project from definition to implementation has as ultimate end to set the grounds for improved user experience at

each touch-point where KONE CRM and KONE CRM user community interact *(the multi-channel integration process)*. Finally, the project intends to result into a set of recommendations and proposals to drive future enhancements of KONE CRM´s opportunities tab layout and overall opportunity management at KONE *(the performance assessment process)*. The above implementation design is described in more detail in *Chapter 5 (Implementation Design)*.

3.3   Barriers to CRM Success

This sub-section aims at presenting some of the most commonly known barriers to CRM success in CRM literature. Payne (2008), for one hand, defines 7 barriers typically faced by organizations in developing their CRM programs. These are as follows (adapted from Payne 2008, 336-338):

- *Lack of skills:* this refers to organizations lacking the capabilities in building and using newly implemented IT based CRM systems, and failing in recruiting enough technically skilled people for the project implementation or relying too much on vendor training to meet the needs.

- *Inadequate investment:* gaining sufficient funding to support CRM programmes is often a challenge for organizations because of the tendency of these projects to dramatically expand in costs and scope. Payne (2008) highlights that some organizations have overcome the challenges around funding by structuring their CRM programs on a `quick wins` basis. This way, CRM implementation projects deliver quick wins and visible benefits at incremental stages, demonstrating immediate progress and returns, and contributing to promote buy-in and motivation within the organization.

- *Poor data quality and quantity:* this is a common issue faced by organizations at different stages of CRM development and can affect differently companies depending on whether they are at an early stage of CRM development or in a more mature phase. Companies like KONE, in a rather mature phase of CRM development, are often more concerned with data-cleansing and de-duplication because data quantity has become a greater problem than data quality. As is further developed in this study

project, duplicate data is one of the common concerns raised by KONE CRM user community when it comes to improvements needed in the tool.

- *Failure to understand the business benefits:* low awareness of the benefits of CRM among senior management is often a barrier for companies in early stages of CRM implementation. Management often perceive data warehousing as high cost and fail to understand the potential financial returns of it in early stages of the project.

- *Functional boundaries:* this is specifically related to a change management issue and the considerable high organizational effort often required to make functional and business unit managers realise of the benefits of greater company-wide operations and cross-functional processes.

- *Lack of leadership and top management involvement:* in close relation with the previous barrier, the lack of management leadership, buy-in and supportive role in driving CRM change management strategy are often considered as one of the main reasons for the failure of CRM programmes. "CRM requires visible top-level backing and the full commitment of the workforce and other partners throughout the supply chain. No amount of IT can compensate for this requirement of human investment. CRM is admittedly a complex task, but equipped with a better strategic understanding, organisations should be able to better realise the huge benefits of effective CRM" (Payne 2006).

- *Inadequate measurement systems:* Payne (2008) observed that poor or inadequate measurement and reward systems can impede the kick-off and realisation of CRM projects. This is often linked to a lack of organizational clarity around goals and poor communication about them to its people.

CRM means different things to different organizations. It is essential that each organization discover what CRM means to them in terms of both, system and strategy. Understanding where they stand in terms of CRM maturity will enable them to define the path to build, step by step, the IT and human competences and capabilities required for a successful implementation and development of CRM. With this in mind, Peelen (2005)

also presents an elaborated list of causes for disappointing results with CRM. They are based on a study conducted by Gentle in 2002. Many of them are aligned with Payne´s earlier mentioned barriers or elaborate further on them. These causes are as follows (adapted from Peelen 2005, 393-394):

- Lack of a business case with clear objectives
- The organization was not ready for CRM (the integration of the front and the back office was still lacking or the quality of the customer data was still insufficient)
- Poor data quality
- The scope of the project was too broad (the company wanted too much at once)
- The lack of active sponsorship from top management
- The project was IT driven and the focus on technology was too strong ("sometimes, the line between tool and strategy becomes blurry to the end user. It is important to sustain the concept that the tool´s purpose is to support the process, not the other way around" (Bondier 2012, 9)).
- Insufficient attention for change management ("top management is expected to use CRM data to draft future strategies. If data is incorrect, or not following the guidelines of the sales management process, the consequences for the business can be great" (Bondier 2012, 10). Besides, "if sales representatives do not understand what benefits they get to use the tool, they will not use it. They need to be able to answer *what is in it for me?*" (Bondier 2012, 10). These are all change management related challenges commonly faced in CRM programmes)
- Customers and others involved in relationships with the company do not react positively to the system (incorrect assumption that customers want a relationship and appreciate the value of CRM)
- The misconception that CRM may be contracted out to system integrators (CRM is too company-specific to place it in others´ hands)
- An international approach to CRM that results in additional complexity and is difficult to justify business-wise (head office imposes the system across the organization and dictates the speed of the project´s realisation with little or no consideration of local gaps)
- A bureaucratic approach to project management (too much focus on project plans and reports, deviating the attention from what really matters)

- Resistance from the IT department

The barriers presented above support Seppänen´s statement that "the major pitfalls in CRM initiatives exist in the negligence of core aspects and elements in CRM, as well as in the corporate resources, competence and overall readiness to implement and act out a beneficial, long-term and unique CRM strategy that supports the overall corporate orientation" (Seppänen 2009, 37). It is not hard to realise that CRM can often represent huge investments in time, money and human resources for organizations with rather little or no significant payback. Therefore, programmes of this nature should never be taken lightly. "Some CRM initiatives not only fail to deliver profitable growth, but also can damage long-standing customer relationships" (Richard & Jones 2006, 120).

What these barriers have taught organizations is that CRM not only requires a clear definition of project scopes and objectives, but also a well-established change management and communication strategy driving the changes to come. The success of this strategy greatly depends on the commitment and strong leadership from top management to promote and encourage adoption and gather CRM allies throughout the organization. An inspiring and relevant training plan also plays a pivotal role in this process. Only when people really understand *what is it in it for them,* they will be willing to embrace and support the changes to come with a positive mindset.

How to increase KONE CRM adoption? How to create the right habits? How to install an inspiring KONE CRM culture? How to bring into the picture the users reaction to change, their learning curve and their commitment to adoption? These are some of the questions KONE often asks its user community as foundation to draft the roadmap for further releases of KONE CRM. They also serve as input to assess and measure KONE CRM success in the organization. KONE CRM Methodology is an effort to utilize user input and feedback to develop a guideline on increasing adoption of the tool, and is dedicated to explore and define ways to build and sustain momentum around KONE CRM development. Risk factors like *poor data quality, insufficient resources, too wide scope, lack of organizational readiness, active sponsorship and business leadership, lack of buy-in from end users/sales managers, lack of involvement of non-sales roles (i.e. marketing) and higher IT-led than business-led* are amongst the most critical and commonly flagged concerns to sustainable KONE CRM development

(KONE Corporation 2013c). Even if KONE CRM is widely understood as a very powerful tool to support sales activities, there are known barriers to its success, which the organization is committed to overcome.

3.4 The Sales Funnel

According to Seppänen (2009), " the KONE Customer Management model describes the processes that make up for the successful management of different customer segments in different phases of the customer lifecycle. The sales funnel methodology is the functional extension of this overall approach" (Seppänen 2009, 48). A sales funnel visually describes the sales process from initial contact to final sale. It gives an understanding of the stages of the sales process, and helps visualizing a potential customer's degree of readiness to commit to a deal. The idea behind a sales funnel is that as a sales opportunity moves down the funnel, the time to close a deal decreases, and the probability of the sale occurring increases. This is as the result of time, effort and resources invested by the seller to remove any existing barriers to the sale. Barriers may vary from uncertainties about the product's fit and value, limited budget or the customer's buying process. As soon as a barrier is eliminated, the opportunity moves to the next stage (MaRS 2012).
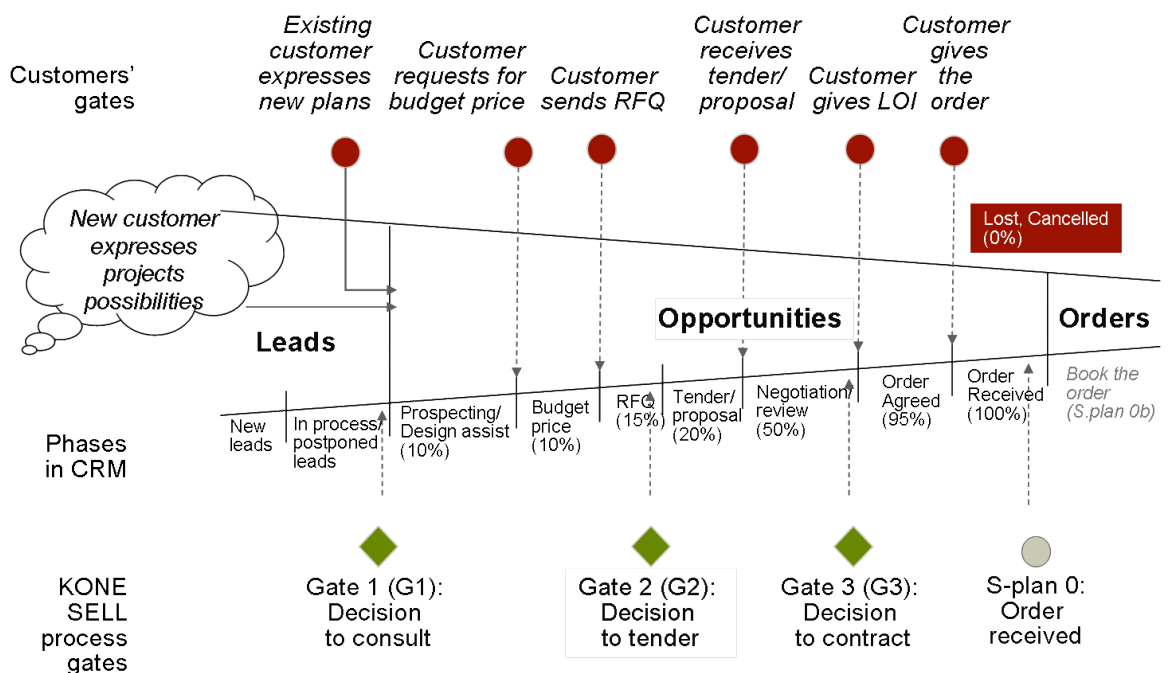

Figure 6. KONE Sales Funnel (KONE Intranet 2013)

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KONE Sales Funnel (see figure 6) is the result of huge efforts made to visualize KONE's sales processes, translated into the different stages of the funnel. It builds a bridge between the sales processes and the customer buying processes. "On a more detailed level it describes the process gates with related deliverables and the individual level actions needed in achieving those gates. Together they form the CRM tool supported backbone of KONE customer relationship management" (Seppänen 2009, 48).

KONE CRM contribution to the sales funnel is that it serves as a unique source of information to track all on-going sales opportunities and the value of projects at each stage of the sales process. "Managing the sales funnel allows sales representatives and countries to balance leads, opportunities and orders. It also helps them to make the best possible use of both time and resources, which leads to better business results" (Bondier 2012, 20).

3.5 Opportunity Management

In CRM, "an opportunity signals the kick-off of your company's sales process with a potential or existing client" (Espinoza 2008). An opportunity tracks, for example, expected close date, the estimated revenue and the probability of closing a deal, as expected, but it may also enable you to track associated competitors, sales person, sales stage, and the completed and to be completed actions/tasks/activities to push the opportunity to a successful deal. In other words, an opportunity helps tracking every person who works or touches an opportunity through the completion of its related activities (Stanton 2008). Therefore, the opportunity record helps you set the deal's size, stage, and timing, making it easier to track in your sales funnel, and manage all of your deal closing activities in one convenient place (Salesforce 2013).

In the context of KONE CRM, opportunities refer to the sales and pending deals that you wish to track. By adding opportunities you are also building your sales pipeline, which will contribute to your forecast. "The Opportunity describes the sales prospects, their requested products and services, the sales prospects' budget, the potential sales volume and an estimated sales probability. This information becomes concrete in the

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course of the sales cycle, and can be displayed and evaluated in the system" (SAP 2015). In this sense, KONE CRM opportunities tab displays a home page that allows you to quickly create and locate opportunities, sort and filter them using standard and custom list views, and enables you to view and edit detailed information on each opportunity which you have access to (KONE Intranet 2013).

"*Opportunity Management* is a part of Customer Relationship Management, which enables you to control your sales process. It allows you to construct a sales methodology to suit your sales processes. Your sales employees are coached through the steps of an ideal sales process - from identifying the lead to closing the sale" (SAP 2015). The study of effective Opportunity Management is at the top priority list for this project. Exploring ways to further improve KONE´s overall Opportunity Management and define best practices around it is one of the central drivers of this study. Effective Opportunity Management should be at the backbone of every organization´s strategy because "it is the complete process of tracking and managing new revenue opportunities (prospective and existing customer business) from the generation of the opportunity to their conversion into a customer relationship that when well-defined and properly implemented provides insight into the effectiveness and efficiency of marketing and sales efforts" (Patterson 2013).

What is clear here is that, a well-established and systematically followed-up CRM strategy, supported by an efficient and well-adopted CRM tool, should go hand by hand with every organization´s Opportunity Management efforts. As a matter of fact, a webinar conducted by Matt Close, EVP Sales from the TAS Group on 14 May 2013, defines a list of 10 elements of great Opportunity Management, where *integrated with CRM* is one of its key foundations. Figure 7 presents TAS Group´s full list (Close 2013):
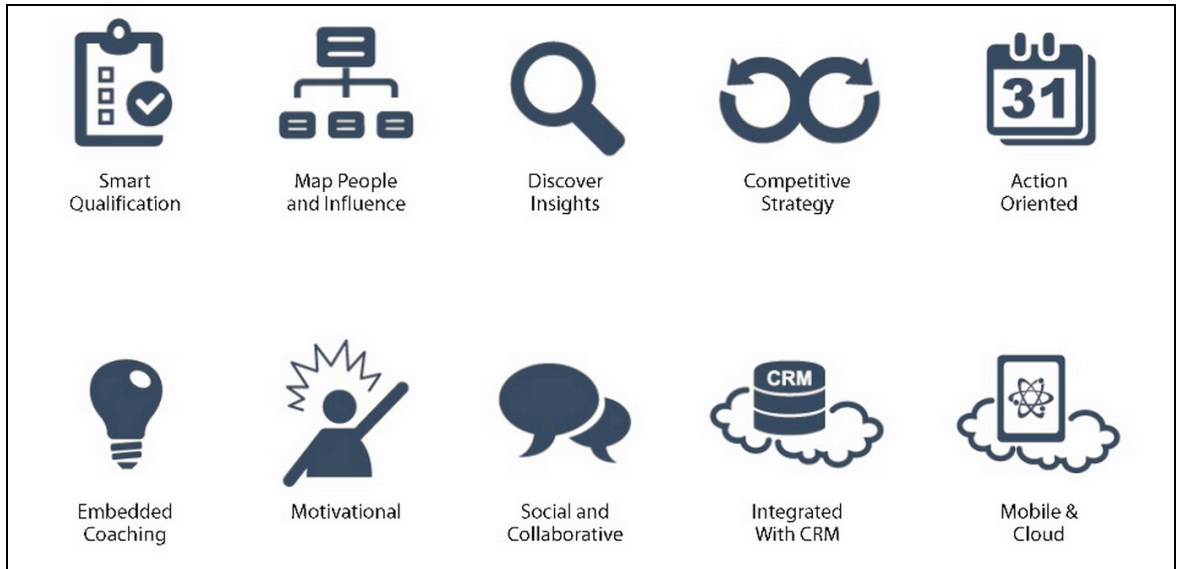
Figure 7: 10 Elements of Great Opportunity Management (Close 2013)

Numerous authors have adventured into the challenging task of defining best practices to guide organizations into establishing an efficient and well-structured Opportunity Management strategy. Laura Patterson, president and co-founder of VisionEdge Marketing Inc., defines six best practices when it comes to Opportunity Management. These, in her opinion, facilitate a collaborative and aligned marketing and sales team and make possible for them to manage a predictable but reliable opportunity pipeline following a plan that ultimately permits higher value opportunities and maximizes companies´ revenues. These are (adapted from Patterson 2013):

- *Using the customer buying process as the foundation for aligning both organizations:* each customer segment/type requires its own process map and the more an organization is able to define the buying process behaviourally the better.

- *Tracking and scoring opportunities based on both fit and behaviour:* a qualified opportunity should both be a good fit (segment, buyer type, revenue, need, etc.) for the company and also behaviourally demonstrate sales readiness.

- *Collaborating on defining a qualified opportunity to determine when it is truly sales-ready:* there is a difference between an opportunity being sales worthy vs. being sales ready but the true is that sales people ideally go for *sales ready* opportunities.

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- *Measuring marketing's impact on the sales pipeline and the number of open opportunities that result from marketing programs:* there is more to measuring marketing than counting leads because the ultimate goal is to generate more customers, faster, and less expensively for which metrics are required at all stages.

- *Using customer behaviour to map the most appropriate next interactions:* once companies understand their customers' buying process, it is possible to develop and manage content and channels across the lifecycle.

- *Leveraging opportunity-nurturing programs:* marketing and sales should agree upon a plan to nurture opportunities that are not yet sales ready.

Opportunity Management in CRM goes, however, beyond the above traditional best practices. NEXJ Systems (2015), for instance, introduces an interesting approach to Lean and Opportunity Management in CRM as shown in figure 8:
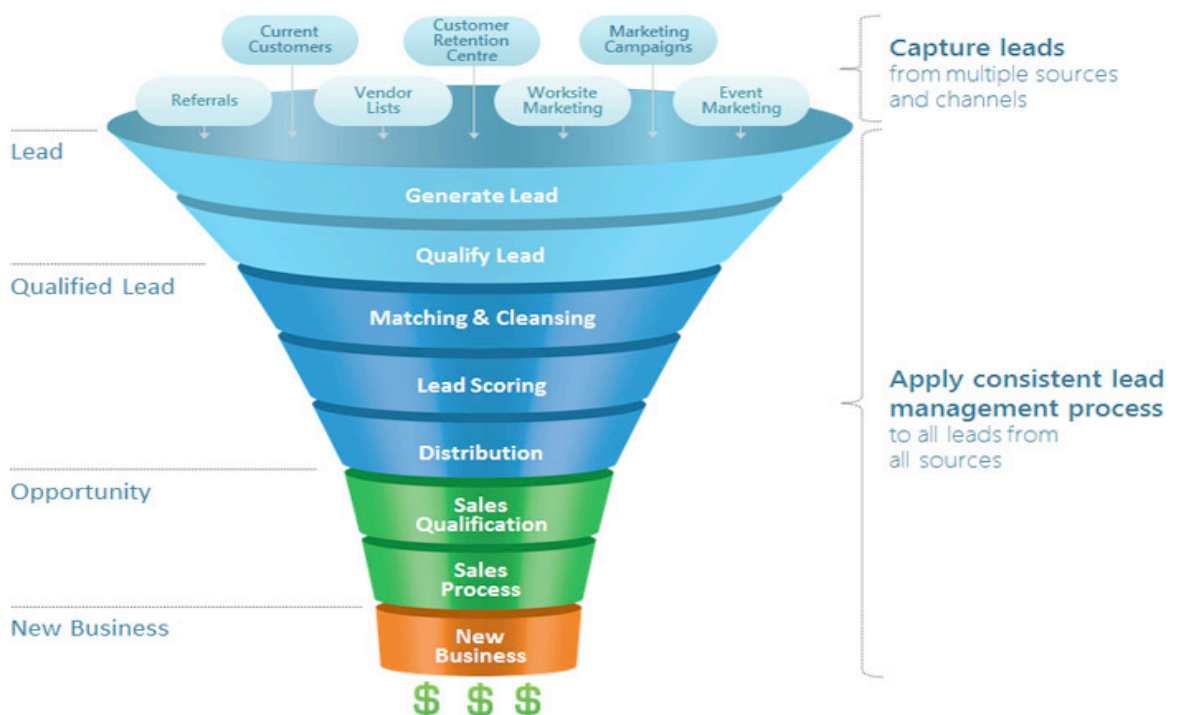

Figure 8: NEXJ Systems´ Lead and Opportunity Management (NEXJ Systems 2015)

According to NEXJ Systems´ Lead and Opportunity Management Strategy[1], the following is required for a successful Opportunity Management in CRM (taken from NEXJ Systems 2015):

- Apply a consistent lead management process to all leads from all sources
- Institutionalize best practices and the implementation of closed-loop Analytics[2]
- Drive the right behaviours and enable management to eliminate bottlenecks and optimize results
- Match new leads against lead and customer to identify erroneous, duplicate and related leads
- Distribute leads to users based on intelligent business rules
- Automate the sales process best practices that help convert leads and drive more revenue

To make an Opportunity Management tool like KONE CRM advantageous to both, sales people and the organization, there are certain pre-requisites. Rainer Gerlach (2013) defines 3 key pre-requisites for proper implementation of an Opportunity Management tool: the number one pre-requisite is *trust*. In words of Gerlach, "an opportunity management system should not be the Big Brother. If it is used for that, opposition is certain and failure likely" (Gerlach 2013). This means that companies should ensure a common understanding around the benefits from successful Opportunity Management and focus attention on building people´s trust around the strategy being implemented. This requires Gerlach´s second pre-requisite that is *involving people*. Every organization should facilitate means of exchanging views and information around the changes to come. As stated by Gerlach, people "will support the implementation because they have influence and take part in the decisions. They will also help to make sure that the new system and the related processes are practicable and useful for everybody" (Gerlach

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[1] For more information on the main differences between a CRM lead and an opportunity, refer to URL: http://blog.pipelinersales.com/sales-management/sales-methodology/difference-between-crm-lead-and-an-opportunity/.

[2] For more information on closed-loop analytics refer to Eridon 2013.

2013). Last but not least, Gerlach states that ***persistence*** is the third key pre-requisite for proper Opportunity Management tool implementation. In his view "company management has to make sure that the new opportunity management system forms the backbone of the sales processes, and the information coming out of it is used as basis for all individual sales discussions and sales management meetings" (Gerlach 2013).

3.6   User-focused related frameworks, theories and concepts

This study recognizes the great importance of involving users in all phases of a development project like KONE CRM, from planning to design, and throughout the system´s lifecycle. Users should be regarded as key sources of information and validation in terms of improvements needed or changes to be implemented. From this discussion emerge various key frameworks, theories and concepts relevant for the development of this study project. These are: *1) Human-Computer Interaction (HCI); 2) User-Centered Design; Human-Centered Software Engineering (HCSE); 3) Usability and; User Experience (UX).* They will be briefly introduced in this report because of their importance to understand the research problem and to support this project´s knowledge creation process, but will not be discussed in detail as part of the scope of this project. Instead, it is suggested to use them basis for further research and as potential areas for further study of KONE CRM. This is suggested in *Chapter 8* under sub-section *8.1. Recommendations and future research.*

From one hand, "Human-Computer Interaction (HCI) is a discipline concerned with the design, evaluation and implementation of interactive computing systems for human use and with the study of major phenomena surrounding them" (ACM SIGCHI 2009). HCI is a broad interdisciplinary area of emerging concern within several disciplines, each with different emphasis: "*computer science* (application design and engineering of human interfaces), *psychology* (the application of theories of cognitive processes and the empirical analysis of user behaviour), *sociology and anthropology* (interactions between technology, work, and organization), and *industrial design* (interactive products)" (ACM SIGCHI 2009).

Nevertheless, from a computer science perspective, which seems most relevant in this project´s context, HCI is focused on interaction and precisely on interaction between humans and computational machines. From this angle, "Human-computer interaction is concerned with the joint performance of tasks by humans and machines; the structure of communication between human and machine; human capabilities to use machines (including the learnability of interfaces); algorithms and programming of the interface itself; engineering concerns that arise in designing and building interfaces; the process of specification, design, and implementation of interfaces; and design trade-offs. Human-computer interaction thus has science, engineering, and design aspects" (ACM SIGCHI 2009).

Figure 9 presents ACM SIGCHI Curricula for the study of HCI. It is an attempt to list some of the most important topics and areas of study around the design and analysis of human-computer interaction systems. This "inventory" is comprised of 4 big areas or dimensions around the study of HCI as follows (adapted from ACM SIGCHI 2009):

- *Use and context of computers* (this topic covers the general problems of fitting computers, uses, and context of use together and how this has a great impact on the interface itself and its success)

- *Human characteristics* (this area highlights the importance of understanding about human information processing and the nature of human communication and interaction to define requirements)

- *Computer system and interface architecture* (this topic is concerned with the different means machines have for interacting with humans and moving information physically between human and machine)

- *Development process* (this area is interested in the methodology and the practice of interface design, as the construction of human interfaces is both a matter of design and engineering)
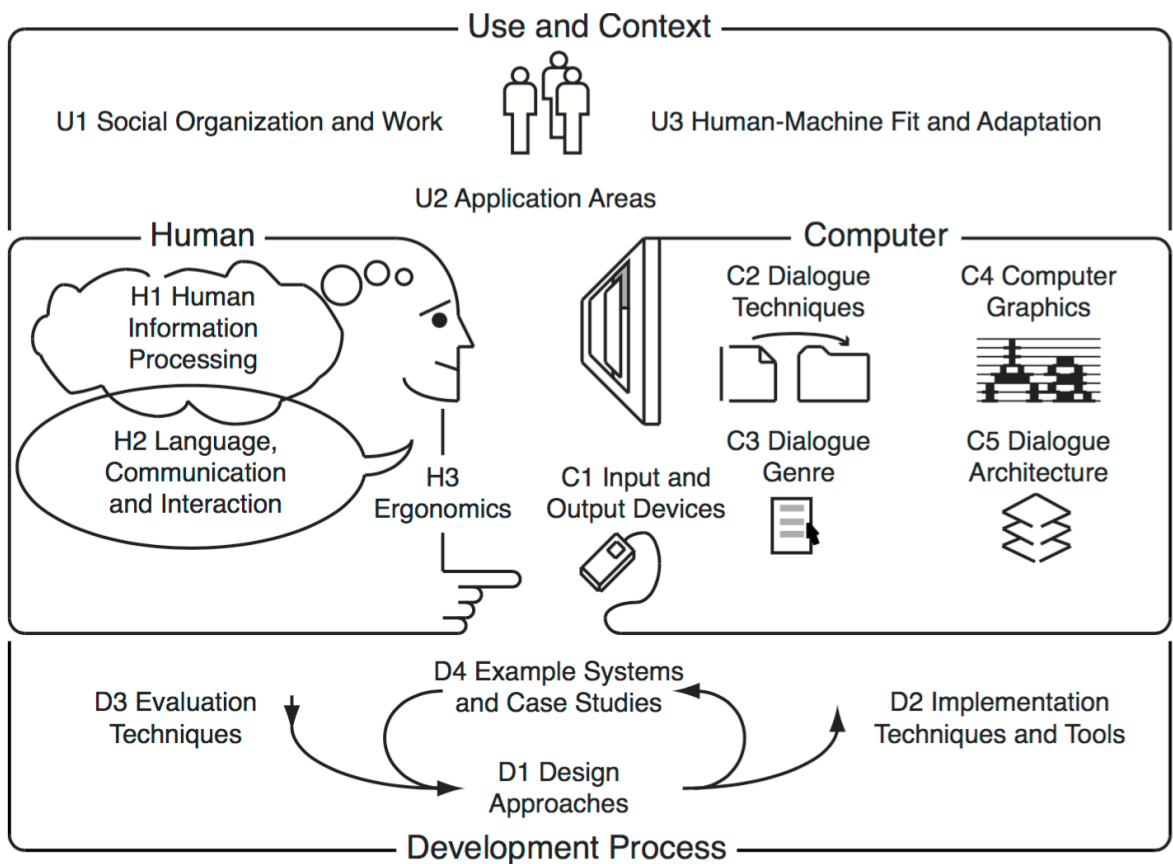
Figure 9: Human-Computer Interaction Curricula (ACM SIGCHI 2009)

As a fundamental part of the Human-Computer Interaction (HCI) emerges a second framework, crucial for the development of this study project: the *User-Centered Systems Design (UCSD)* or simply *User-Centered Design (UCD)*. While HCI studies the different dimensions surrounding the interaction between humans and machines (not only the technical/IT side of it), UCSD explores aspects specifically related to users and a particular software/system usability, and is one of the commonly known human-centered designs. UCSD has had several definitions and understandings over the years. For Karat et al. (1996) "is an iterative process whose goal is the development of usable systems, achieved through involvement of potential users of a system in system design" (Seffah et al. 2005, 18). Karat (1997) suggests considering it as "an adequate label under which to continue to gather our knowledge of how to develop usable systems. It captures a commitment the usability community supports - that you must involve users in system design - while leaving fairly open how this is accomplished"(Seffah et al. 2005, 18).

In words of Norman and Draper (1986), "user-centered design emphasizes that the purpose of the system is to serve the user, not to use a specific technology, not to be an elegant piece of programming. The needs of the users should dominate the design of the interface, and the needs of the interface should dominate the design of the rest of the system" (Seffah et al. 2005, 18). For the purposes of this study, UCSD is understood as *"a process focusing on usability throughout the entire development process and further throughout the system life cycle"* (Seffah et al. 2005, 36). This process is illustrated in figure 10.
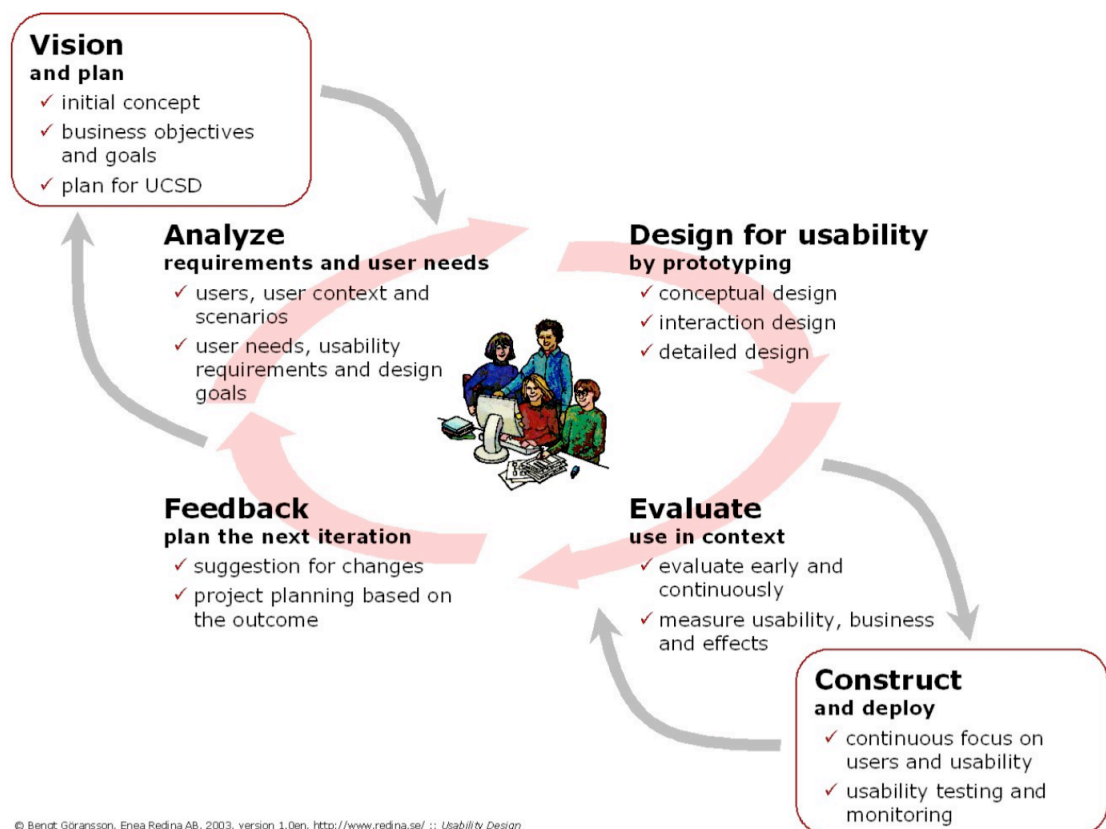
Figure 10. The User-Centered Systems Design Process (Gulliksen et al. 2003, 5)

UCSD is based in 12 key principles briefly described below (adapted from Seffah et al. 2005, 36):

- *User focus* (activity´s goals, work domain or context of use, user´s goals, tasks and needs should early guide the development)

- *Active user involvement* (active, early and continuous user participation throughout the entire development process and the system lifecycle is required)

- *Evolutionary systems development* (iterative and incremental development is a must)

- *Simple design representations* (design must be early understood by users and all other stakeholders)

- *Prototyping* (early and continuous prototyping is needed to visualize and evaluate ideas and design solutions with end users involvement)

- *Evaluate use in context* (baselined usability goals and design criteria should control the development)

- *Explicit and conscious design activities* (the development process should include dedicated design activities)

- *A professional attitude* (the development process needs to be carried out by effective multidisciplinary teams)

- *Usability champion* (all aspects that impact the changes should be developed in parallel)

- *Process customization* (the user-centered systems design should be adapted to each organization's needs)

- *A user-centered attitude* should always be established

Seffah et al. (2005) go beyond the concept of UCSD and present the concept of *HCSE (Human-Centered Software Engineering)*, which is an application of the framework of *Human-Computer Interaction (HCI)* into *Software Engineering (SE)*. As defined by Pressman (2005), HCSE is "*a well-established discipline that encompasses the process associated with software development, the methods used to analyse, design and test computer software, the management techniques associated with the control and monitoring of software projects and the tools used to support process, methods, and techniques*" (Seffah et al. 2005, 10). Seffah et al. (2005) highlight that "by adding that SE should be human-centered, we want to emphasize that there is a need for a shift of focus in systems development towards putting the goals, needs, and wishes of the users in the first room" (Seffah et al. 2005, 10). Doing so enable organizations to better capture and assemble requirements; take advantage of users´ skills and knowledge in designing well-functioning solutions meeting those requirements and; empower organizations to build technology that enables those designs. All this involving users in

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testing, system improvement, deployment, maintenance and eventual decommission of a system (Seffah et al. 2005).

As this development project specifically refers to the study of a system, KONE CRM, and is committed to identify ways to improve its usability and adoption by involving its user community in the exploration process, the HCSE framework is considered relevant for this study. It enlightens the process of understanding the research problem, but more importantly, gives additional meaning and basis to the author for formulating a set of recommendations to guide decision-making and support actions around further releases of the system with a user-centered focus. There are several reasons for placing a high focus on users involvement in all phases of software/system development. Seffah et al. (2005), for instance, discuss some of the main reasons for system development projects´ failure, which appear to be commonly related to usability problems or lack of user involvement:

"Several studies have shown that 80% of total maintenance costs are related to user's problems with the system and not technical bugs (Boehm, 1991). Among them, 64% are usability problems (Landauer, 1995). A survey of over 8000 projects undertaken by 350 US companies revealed that one third of the projects were never completed and one half succeeded only partially, that is, with partial functionalities, major cost overruns, and significant delays (Standish Group, 1995). Executive managers identified the major source of such failures from poor requirements (about half of the responses) - more specifically, the lack of user involvement (13%), requirements incompleteness (12%), changing requirements (11%), unrealistic expectations (6%), and unclear objectives (5%)" (Seffah et al. 2005, 4).

Seffah et al. (2005) also analyse further the above-mentioned problems and conclude that in developing highly interactive software with significant user interface, most software engineering methodologies fail to propose mechanisms for: "(1) explicitly and empirically identifying and specifying user needs and usability requirements, and (2) testing and validating requirements with end-users before, during, and after the develop-

ment. As a consequence, the developed systems generally meet all functional requirements, and yet are difficult to use with effectiveness, efficiency and satisfaction. The lack of adequate methodologies explains a large part of the frequently observed phenomenon whereby large numbers of change requests to modify are made after its deployment" (Seffah et al. 2005, 4).

Closely related to *HCSE* are the concepts of *Usability* and *User Experience (UX)*, also relevant for the purposes of this study project. *Usability*, for one hand, is a concept that can be understood in various ways. "For many, it simply means *ease- of-use* or *user friendly*, a term introduced in the early days of HCI. It is the expression we still find in many project requirements definitions, standing alone among other non-functional requirements, as though this term encompasses all there is to know about the field" (Seffah et al. 2005, 5). Usability is also understood as a quality attribute that assesses how easy user interfaces are to use, and refers to methods for improving ease-of-use during the design process (Nielsen 2012). Besides, it is considered as a measure of the interactive user experience associated with a user interface whose design should be easy-to-learn, support users´ tasks and goals efficiently and effectively, and should satisfy and engage to use (Usability First 2015). Furthermore, as per ISO/IEC 9126- 1 (2000) definition, Usability refers to *"the capability of the software product to be understood, learned, used and attractive to the user, when used under specified conditions"* (Seffah et al. 2005, 6). It implies *"a set of attributes such as user performance (task completion and execution time, error rate), satisfaction and learnability"* (Seffah et al. 2005, 6).

In this regard, Nielsen, J. (2012) defines 5 quality components of Usability that help understanding its definition and context (taken from Nielsen, J. 2012):

- *Learnability:* How easy is it for users to accomplish basic tasks the first time they encounter the design?

- *Efficiency:* Once users have learned the design, how quickly can they perform tasks?

- *Memorability:* When users return to the design after a period of not using it, how easily can they reestablish proficiency?

- *Errors:* How many errors do users make, how severe are these errors, and how easily can they recover from the errors?

- *Satisfaction:* How pleasant is it to use the design?

Usability is important for various reasons: from the user's perspective, it can define whether or not a task is performed, and whether the user enjoys or suffers in the process. From the developer's perspective, it can define the success or failure of a system. From a management point of view, software with poor usability can negatively impact the productivity of the workforce to a level of performance worse than without the system. In all cases, the lack of usability can result into high costs in terms of money, time, and human effort and define the success or failure of a system. But what is clear is that people tend to buy and support systems proven to be more user-friendly (Usability First 2015).

User Experience (UX) or User Experience Design (UXD), on the other hand, "*is an approach to product development that incorporates direct user feedback throughout the development cycle (human-centered design) in order to reduce costs and create products and tools that meet user needs and have a high level of usability (are easy to use). […] User experience work is based on designing products and services with the people who will use the product or service in-mind (users)*" (Usability Professionals´ Association, UXPA 2013). Besides, "User Experience Design (UXD) entails conducting user research exercises with intended users of a system. User research reveals users' needs and preferences through user observations, one-on-one interviews, and creative activities that encourage users to express their emotions, motivations, and underlying concepts and beliefs about the steps involved in task procedures. By understanding the human emotions, motivations, and beliefs that surround a task, a user interface can be designed to accommodate and support user behaviours in a way that users will experience as natural and satisfying" (Usability First 2015).

Applying UX for a product development process can bring significant benefits like "increased productivity; increased sales and revenues; decreased training and support costs; reduced development time and costs; reduced maintenance costs and; increased customer satisfaction" (Usability Professionals´ Association, UXPA 2013). For additional

and more detailed information on the concept and framework of user experience, refer to the work of Hassenzahl, M (2003) and Roto, V. et al (2011). Here it is important to mention that the study of concepts like Usability and UX/UXD lead us to conclude that this project can also be seen as an effort to apply their principles through real-time user observations, experience and feedback as input to propose further enhancements of KONE CRM opportunity tab layout and potential development areas of the overall opportunity management at KONE. Moreover, its ultimate objective is to drive real customer satisfaction, usability and adoption of KONE CRM in an ever-changing business environment.

In this regard, Seppänen´s study of KONE CRM as a Value Driven CRM Platform (2009) stated that "one of the principles in the entire KONE CRM platform project has from the very beginning been the ability of the platform to adjust to the ever changing business environment. This is one of the main reasons why KONE selected Salesforce.com as its CRM provider. The innovative on-demand software-as-a-service (SaaS)[3] business concept has served KONE well. One of the main reasons why companies succeeded with the Salesforce.com concept is because it gives business instead of IT people the possibility to be in the driver´s seat. Companies do not have to worry about the maintenance or development of the platform, but can focus their efforts in tailoring it to their needs. Interaction with customers is at most importance to Salesforce.com business, at it is Salesforce.com´s responsibility to see to it that the platform continuously meets clients demands" (Seppänen 2009, 54).

Another important observation made by Seppänen (2009) is that "the interaction with Salesforce.com has been for KONE one of the major sources of innovation. In cooperation with Salesforce KONE has been able to benchmark its solution with such companies as Siemens, Toyota, Motorola, Honeywell and Dell and establish relationships and

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[3] " Software as a service (or SaaS) is a way of delivering applications over the Internet as a service. Instead of installing and maintaining software, you simply access it via the Internet, freeing yourself from complex software and hardware management. SaaS applications […] run on a SaaS provider's servers. The provider manages access to the application, including security, availability, and performance" (Salesforce 2015a).

discuss with other Salesforce users in seminars such as Dreamforce[4]. Through regular interaction with Salesforce KONE is also continuously updated about the latest development initiatives on the Salesforce side as well as in the Salesforce developer community" (Seppänen 2009, 54).

In addition, Seppänen´s study (2009) also concluded that "the active developer and user community is another remarkable value adding component in Salesforce concept. Through IdeaExchange[5], an Internet community for Salesforce user community, Salesforce has been able to establish a real-time communication channel with its user community, which acts as a continuous source of customer needs driven development innovations. This concept has also been released for Salesforce customers to be used for internal idea gathering" (Seppänen 2009, 55). Furthermore, "on top of the one-to-one interactions and the IdeaExchange, Salesforce.com has also established its own application marketplace called AppExchange[6] in order to ensure the availability of add-on applications operating on its platform. The AppExchange allows for third party developers to post their Salesforce compatible applications on display. The AppExchange has also acted as a source of innovation for KONE as it allows for the KONE internal development team to get information and do sandbox testing of many of the available adds-on" (Seppänen 2009, 55).

As a conclusion of this chapter, it is important to highlight once more the great importance of CRM and CRM systems and processes not only to empower companies to commit to record all the relationships with their customers, but also as central point of information around customer data and customer knowledge. This information should serve not only as sources of interpretation and data analysis but also should be systematically used as input for decision-making. How well an organization is able to fulfil this role will depend on how CRM is defined and implemented within the organization. Top

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[4] More information on Dreamforce can be found at http://www.salesforce.com/dreamforce/DF15/faq.jsp.

[5] Additional information on Salesforce IdeaExchange community can be found at
https://help.salesforce.com/HTViewSolution?id=000205453.

[6] Additional information on Salesforce AppExchange can be found at
http://www.salesforce.com/appexchange/overview/.

management plays a pivotal role in the change management process surrounding any CRM implementation and overall CRM lifecycle. CRM should not be imposed but should be the result of a process where users are involved in all phases of the development from scope and objectives definition to development and implementation. Users´ experience and usability should be at the very top of any system development process and drive, from the early stages, all definitions, concepts and decisions made around the changes to be implemented. To maintain this users´ focus, organizations can resource to frameworks like the Human-Computer Interaction (HCI), User-Centered Design (UCD) and Human-Centered Software Engineering (HCSE), and to concepts and methodologies like Usability and User Experience (UX), which give light into the challenging process of putting users at the very center of attention of any system development effort.

4   Research Methodology

Within the context of the IBMA Master's thesis, students are expected to "develop and demonstrate the ability to apply the selected research philosophies, strategies and methods in identification and solution of an authentic, work related, international business management problem" (HAAGA-HELIA 2011, 1). However, the purpose and context of any research project can differ considerably.

Saunders at al. (2009) state that all business and management research projects can be placed on a continuum according to their purpose and context. At one extreme of the continuum is research targeted to purely understand the process of business and management and their outcomes, and is often undertaken at universities and as a result of an academic agenda. This type of research is known as *basic, fundamental or pure research.* At the other end of the continuum is the type of research that is of direct and immediate relevance to managers, addresses issues that they see as relevant, and is presented in ways that they can understand and act upon. This is known as *applied research.*

This study intends to be a form of *applied research*, where the idea is to improve the understanding of an authentic, work related and international business management problem of relevance for the sponsor organization through mainly qualitative research methods[7]. Qualitative research[8] has been has been chosen by the author because the idea is to *a) understand the meaning of events, activities, situations and actions of people observed; b) understand a particular context and people's interactions on it; c) identify unanticipated phenomena and influences and generate new theories about them; d) understand the processes by which events and actions occur; and e) develop causal explanations.* Besides, despite it is often claimed to lack of repli-

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[7] More information on *Qualitative Research Methods* can be found on Amaraturga, D., Baldry, D., Sarshar, M. & Newton, R. 2002. pp. 25-26.

[8] More information on *Qualitative Research* can be found on Amaraturga, D., Baldry, D., Sarshar, M. & Newton, R. 2002. pp. 21-22.

cability, reliability and validity, qualitative methods can very often help to understand numbers and give real and full insights into a phenomenon (Sinkovics et al. 2005).

Being this said, the next step is to define the study's research philosophy and approach. This is of great importance because "the research philosophy you adopt contains important assumptions about the way in which you view the world. These assumptions will underpin your research strategy and the methods you choose as part of that strategy" (Saunders et al. 2009, 108). In an effort to clearly define its research philosophy and approach, this study follows the model of the research onion (see figure 11) developed by Saunders et al. (2009):
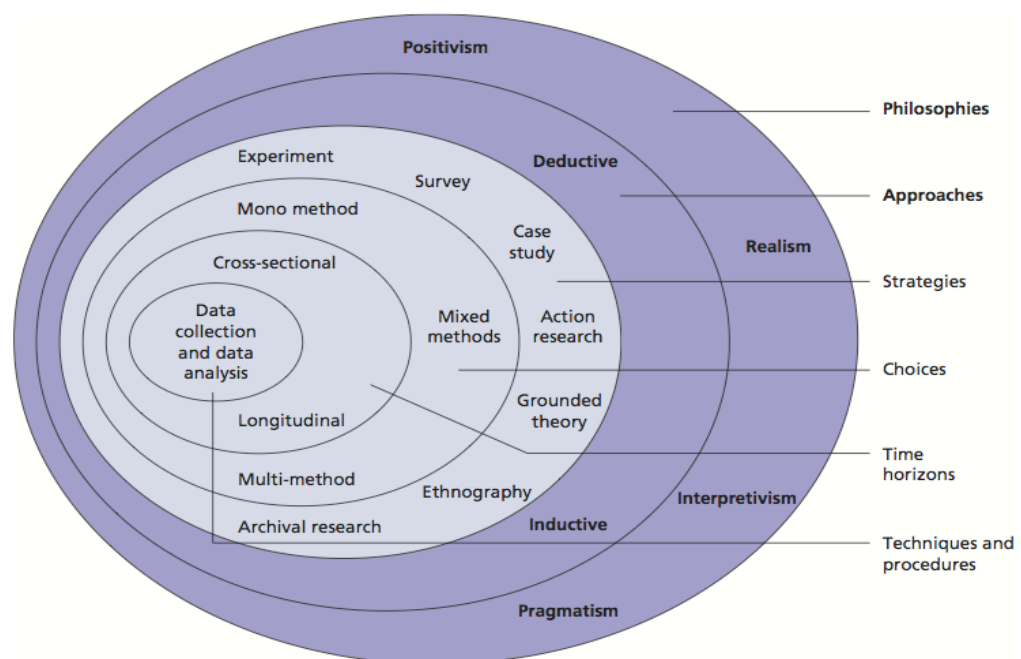

Figure 11. The research onion (Saunders et al. 2009, 108)

While the outer layers of the onion point to the philosophies and approaches to conduct the research, the inner layers focus on the research strategies, methods, techniques and procedures for data collection and data analysis. The research onion is applied throughout this study as follow:

a) Research philosophy: this study is conducted based on the principles of *Interpretivism.* "Interpretivism advocates that it is necessary for the researcher to understand differences between humans in our role as social actors. […] Crucial to the interpretivist philosophy is that the researcher has to adopt an empathetic stance" (Saunders et al. 2009, 116).

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This means that the researcher needs to enter the social world of the research subjects and try to understand their world from their point of view. Given that for interpretivists reality is relative and multiple, an interpretivist researcher enters the field with some sort of prior insight about the research topic but assumes that it is insufficient. This is due to the complex, multiple and unpredictable nature of what is perceived as reality. Therefore, during the data collection the researcher and his informants are independent and mutually interactive with each other and construct a collaborative account of perceived reality. The researcher remains open to new ideas throughout the study and let it develop with the help of his informants (Hudson & Ozanne 1988).

The author has chosen interpretivism because her intention is to understand and interpret motives, meanings, reasons and other subjective experiences of a reference group of KONE CRM users as basis to build knowledge on potential simplifications and development areas for the opportunities section of KONE CRM and overall KONE opportunity management. As the research will mainly be of qualitative nature, interpretivism seems the most appropriate research philosophy in this case.

b) Research Approach: this study follows an *Inductive* research approach. Rather than testing theory as is common in *deductive* research approaches, induction aims at building theory. This basically means moving from specific observation to broader generalization and theories, which is also known as "bottom up" approach, where theory is developed after data has been collected and analysed. The goal is to understand the phenomenon of "why it is happening".

The author has opted for an inductive research approach because she wishes to gain a deeper understanding of the nature of the research problem and the context where it takes place, which she is not sufficiently familiar with, and analyse all data collected during the research process as basis to formulate theories that can explain the research problem, and facilitate its solution. Besides, as this study mainly focuses on qualitative data, the research sample (reference group) is relatively small, and the research is less concerned with generalizations and more with gaining an understanding of the research context with a flexible structure, an inductive research approach seemed most appropriate.

c) Research Strategy: this research project is developed in the form of *action research*[9]. Action research refers to an iterative process involving researchers and practitioners acting together on a particular cycle of activities, including problem diagnosis, action intervention, and reflective learning (Avison et al. 1999). According to McNiff (1988), it is an approach that distinguishes for exploring and solving problematic issues through a self-inquiry process where research is done with people rather than on people, and involves a self-reflective spiral of planning, acting, observing, reflecting, and re-planning in order to improve practices through change (Reason & Bradbury 2007). These characteristics are the ones justifying action research as research strategy in this study: the motive is to address a practical, real-life organizational problem; the aim is the construct knowledge to produce change and enact change to produce knowledge; and is a participatory research process where the author works closely and cooperates with a given reference group to establish the basis to lead future organizational change.

d) Research Method: This research project is prepared in the form of a *multi-method qualitative study*, where mainly qualitative data is collected using *one-to-one semi-structure qualitative interviews (phase 1)* followed by a *post focus group (phase 2).* In both phases, participants are requested to fill in a *quantitative online KONE CRM End-User Survey* in preparation for the sessions. *Interviews* are conducted by telephone as interviewees are scattered all over KONE offices, while the *post focus group* is conducted face-to-face in KONE offices in Chertsey, United Kingdom (UK).

e) Time Horizon: The research project is defined as a *cross-sectional study*, because it is the study of a particular phenomenon (KONE CRM opportunities tab and KONE opportunities management) at a particular time, and there is time constraints based on a previously defined research schedule (Saunders et al. 2009).

f) Data collection and data analysis: The data collected throughout this study is analysed using mainly non-numerical (qualitative) procedures. In the first phase (qualitative interviews), the outcome of the interviews is transcribed and the main development

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[9] More information on *Action Research* can be found in Avison, D., Lau, F., Myers, M. & Axel Nielsen, P. January 1999.

themes/areas/categories identified, analysed and presented using the *colour coding technique[10] and the word cloud*[11]. In the second phase (focus group), the *affinity diagram*[12] is used as primary data collection technique to organize the information and ideas proposed by the focus group participants into common themes, and summarize the results of the session. Here it is important to mention that the identity of the CRM users involved in this study's first and second phases remains confidential throughout the whole report. This is following a prior agreement with the sponsor company and in compliance of the ethics established for this study.

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[10] More information on the *Colour Coding Technique* can be found on Stottok, B., Bergaus, M. & Gorra, A. January 2011.

[11] According to the *Online Oxford Dictionary*, "a *World Cloud* is an image composed of words used in a particular text or subject, in which the size of each word indicates its frequency or importance". All word clouds included in this report were created using *Wordle*.

[12] More information on the *Affinity Diagram* can be found on *MindTools* website.

5 Implementation design

This study starts with the author familiarizing herself with the context and functionality of KONE CRM opportunities tab, given that she is conducting the research as an external party. Things like its general structure and how opportunities are created and maintained in KONE CRM are studied by the author through material available from existing KONE CRM user manuals, guides, training material and KONE intranet pages.

Once the author gains a general understanding of the context and functionality of the opportunities tab, a project plan is drafted establishing the study's scope and objectives, research methodology and data collection and data analysis techniques to follow. After the plan is finalized and approved, the first step is to conduct *one-to-one qualitative interviews* with members of a reference group provided by KONE, to collect feedback and insights on the main concerns and enquire about potential areas for simplification and further developments of the KONE CRM opportunities tab and overall KONE opportunities management. The interviews are conducted with the help of a pre-defined interview protocol, which is developed and agreed upon together with the sponsor company, but interviews are kept semi-structured to allow flexibility and freedom for interviewees to contribute as much as possible.

The reason to select qualitative interviews is because they allow the individuals freedom to create shared meaning with the researcher; allow space for the surfacing of additional arguments or adding different dimensions to a perspective; provide access to data that would not generally be accessible in other ways; and create understanding between the interviewer and the respondent that there can be more than one perspective of the same problem, allowing for the appreciation of alternative views. However, some challenges associated with doing qualitative interviews are also acknowledged like less control over the data collected; the interviewees may not have enough knowledge about the phenomenon being studied; and as a reference group is used as study sample and specific people were selected, alternative or opposing views may be left out (Korpel 2005).

The interviews are transcribed and the most recurrent emerging topics are put into categories or themes, with concentre examples of what could be simplified or improved

under each category according to the interviewees. The colour coding technique and the world cloud are used to analyse and present the results. The colour coding technique is used to differentiate among categories and the world cloud to give a graphical view of which emerging topics are more important (mentioned more times) for interviewees throughout the whole interview round. The results of this first round are presented and discussed with the sponsor company (i.e. thesis tutor) and the Haaga-Helia thesis supervisor as basis to prepare for the post focus group discussion.

The focus group is conducted face-to-face with a new sample (5 UK sales executives) with 2 main objectives: *1) to validate the main emerging themes from the one-to-one qualitative interviews and; 2) to collect some further insights and opinions and additional feedback to improve KONE CRM opportunities' tab and overall opportunity management at KONE.* The author of this study acts as moderator of the session and is supported by her KONE thesis tutor throughout the session. The session is conducted following the principles of the *affinity diagram* method and its format is developed and agreed upon together with the sponsor company.

Once the outcome of the focus group is analysed and summarized, all development areas and proposals gathered throughout the study are presented and discussed with the sponsor company in a dedicated meeting, where their feasibility and potential implementation is evaluated and recorded in the final thesis report. The final report also includes some considerations in terms of limitations faced throughout the research process and suggests potential areas for future study or further research of linked to study topic.

6 Results

6.1 Interview phase: description and main outcomes

As part of the interview phase, 10 one-to-one telephone interviews were conducted between January and February 2014. Each interview took about 30 minutes and followed a qualitative approach. In preparation for the interviews, each interviewee was asked to complete an online (Webropol-based) KONE CRM end-user survey (see appendix 2). The purpose of the survey was to gain a pre-understanding of the context, usage and overall impressions of each interviewee about KONE CRM. This would allow the interviewer having additional input for potential follow-up questions based on individual comments/impressions. Despite the interviews followed a pre-defined qualitative interview protocol (see appendix 3), the idea was to allow a semi-structured interview approach that would enable interviewees to share as much details as possible on their experiences and impressions of the tab as well as give the interviewer the freedom to make additional questions to increase the knowledge gathered during the interviews.

The survey format was based on a pre-existing survey conducted in 2012 by KONE's CRM Solution Owner and tutor of this thesis project, Caroline Bondier, as part of her Master Thesis' data collection process (Bondier 2012). The survey, of quantitative nature, included three category of questions: firstly, background questions like location and business line were asked to get some details on the context of each interviewee in the KONE CRM world; secondly, the survey included questions about KONE CRM usage like weekly login time or whether they systematically record prospects or customer accounts, opportunities, contact information, e-mails, meetings and phone calls in CRM; finally, a few perception questions were also added. Interviewees were asked whether they feel they have received sufficient training in KONE CRM, about the quality of training material and the complexity of the sales processes at KONE.

There was a closing question where interviewees were asked to select 1 out of 3 given choices to describe their overall impression of KONE CRM. They were asked whether they think KONE CRM is a tool that supports their sales work; or whether KONE CRM is a lot of administrative work but they can see the business benefits behind it; or

if entering all customer data in KONE CRM is a waste of their time. This last question was included as a way to measure KONE CRM success because "the more sales representatives will find KONE CRM useful for their daily sales work, the more it will become a strategic advantage" (Bondier 2012, 29).

Even the main approach of this study is of qualitative nature, this quantitative survey was useful to understand how interviewees use the tool and how they perceive the different elements in and around it in preparation for the qualitative interviews. 11 sales representatives and sales managers completed the survey but only 10 of them took part in the interviews round. Due to last minute commitments, one of them was unavailable during the interviewing period. After all interviewees completed the online survey, the interviewer (author of this study) extracted the results from Webropol and familiarized herself with the outcomes. Knowing a bit more about each interviewee beforehand proved itself as an advantage to build an atmosphere of trust and confidence during each interview that facilitated an open and sincere dialogue and very enriching discussions. Each interview took approximately 30 minutes and was conducted in English.

To kick-off the discussion, each interviewee was given a few minutes to introduce themselves and briefly describe their role at KONE and what they use KONE CRM for. Table 2 summarizes the interviewees' profiles:

Table 2: Interviewees' profile table (First Round)

Respondent #	Gender	KONE Location	Business Line	Average KONE CRM weekly login time?
1	Male	United Kingdom	Modernization (TRB)	<1 hour
2	Male	United Kingdom	New equipment (NEB)	>6 hours
3	Male	Italy	Maintenance (SEB)	>6 hours
4	Male	Russia	New equipment (NEB)	4-6 hours
5	Female	United Kingdom	Doors	>6 hours
6	Male	United Kingdom	Maintenance (SEB)	4-6 hours
7	Male	Canada	Maintenance	>6 hours

Respondent #	Gender	KONE Location	Business Line	Average KONE CRM weekly login time?
			(SEB)	
8	Male	Denmark	New equipment (NEB)	>6 hours
9	Female	Turkey	Maintenance (SEB)	1-3 hours
10	Male	Singapore	Maintenance (SEB)	>6 hours
11	Male	Russia	New equipment (NEB)	1-3 hours

Once interviewees had the opportunity to briefly introduce themselves, the interviewer followed the pre-defined interview protocol which included 4 questions: 3 of them directly related to this master thesis' research question and 1 side question related to another Global CRM team's upcoming initiative which the interviewer was requested to formulate too. Please note that the details of this last side question will not be further analysed in this report but its outcomes have been collected and passed on to the Global KONE CRM team for their follow-up and further actions. The last 5-10 minutes of the interview were reserved to discuss around each interviewee's KONE CRM end-user survey results. The interviewer focused her attention on those areas were interviewees indicated to be either in disagreement or in strong disagreement and asked them to share more details around that or to provide any additional feedback that they wished to be passed on to the Global KONE CRM team.

One of the downsides noted during the interviews was related to the different levels of English language among interviewees. Not all interviewees were native English speakers nor had the same level of command of English, for instance, because they work in their local language. In those cases were language constrains appeared, the discussions were more challenging. There were no major implications on those cases more than the need to allocate more time than planned to allow the interviewee to finish up all his/her ideas and comments. It was a limitation not only at the time of the interview but also while preparing the transcripts.

Another shortcoming noted during the interviews and which actually had a major impact in their outcome was the difficulty shown by most of the interviewees to concen-

trate on the opportunities tab rather than thinking on the whole KONE CRM. In various cases interviewees found it very difficult to identify elements for simplification or proposals to improve the user experience within the opportunities tab and often fall into the tendency of speaking of issues affecting KONE CRM as a whole. Despite of various follow-up questions to focus the attention on the opportunities tab, some interviewees found it very hard or were simply not able to come up with improvement or simplification ideas for the tab and provided rather general feedback. This was very challenging for the interviewer to avoid and unfortunately happened in the majority of the interviews. However, some opportunity tab-specific development proposals were also collected and are further discussed and categorized in this section.

The following is a summary of the main outcomes collected during the qualitative interviewing round. Answers have been simplified in key words/short sentences accompanied by a brief description/example to facilitate their analysis and allow grouping and comparison. Colour coding is used to differentiate among categories and the world cloud is utilized to illustrate the importance/weight of each category against the total (how many times each category repeated throughout the whole interviewing round). Full details of each interview can be found in their corresponding transcripts (see appendix 4). Those comments/proposals/ideas referring to KONE CRM as a whole and not specifically related to the opportunities tab have been grouped into one category (i.e. *General KONE CRM feedback)* and indicated with a comment.

a) Question 1 (Q1): What is your main challenge/complain when it comes to KONE CRM opportunities tab layout?

Table 3 presents a summary of the emerging categories collected during the interview round's Q1. According to interviewees, the main concerns when it comes to the opportunities tab layout are related to *time* (mentioned 5 times), *unnecessary or too many compulsory fields required* (mentioned 5 times) before the system allows you to save an opportunity and *lack of data synchronization* with other KONE systems like SAP (mentioned 2 times). There were also three *general KONE CRM feedback* related concerns raised during this question, which are relevant for KONE CRM as a whole but not directly related to the opportunities tab. Full details of all concerns collected through Q1 are given in table 4.

Figure 12, on the other hand, provides a graphical summary (world cloud) of the emerging categories collected in this question. The bigger the size of the category's font, the more importance it has in the categories' total, meaning the more it was mentioned by interviewees during Q1.

Table 3. Frequencies in interview round's Q1

Category	Frequency in Q1
Time consuming	5
Unnecessary/too many compulsory fields	5
Lack of synchronization with other KONE systems	2
Too much data required for lost opportunities	1
Inaccurate stages of probability	1
General KONE CRM feedback • Time constrains to enter data in the system • Duplicate data • Limited search functionality	3

Table 4. Colour coding of frequencies in interview round's Q1

Interviewee	Main challenge /complain	Additional Details
1	Time-consuming	No major issues but in general too many details required to complete most sections.
2	Unnecessary/too many compulsory fields	Few boxes not relevant to all business lines/departments (e.g. project information) but as not compulsory, you can simply bypass them.
3	Time-consuming Unnecessary/too many compulsory fields	Despite being pretty straight-forward and easy to use, too much data is still required before it allows you to save.
4	Unnecessary/too	Not all fields are relevant for all business lines (e.g.

Interviewee	Main challenge /complain	Additional Details
	many compulsory fields	Project information is relevant for NEB but not for VP repairs).
	Too much data required for lost opportunities	It takes at least three steps to mark an opportunity lost and often you only know retroactively the information of the order winner/competitor but there is no time to retroactively update the system as you are focused on the net win. This also ruins a couple of dashboards because when your competitor is other or unknown, end value is one (1) because you have to put something there to be able to save. Other people don't bother and simply mark the opportunity as cancelled.
	Lack of synchronization with other KONE systems	Same data often has to be entered several times in different instances/systems. For example, as no estimate sheet is currently built into Salesforce, all information put into it to create a quotation has then to be re-entered as an opportunity there. Ideally, an estimate sheet built into Salesforce would turn into an opportunity/pull data from the estimate sheet to populate automatically the opportunity to avoid double entering. Furthermore, if the opportunity is realised and an order is made, this order has to be entered in SAP but the status of the opportunity is not automatically updated in Salesforce but the update needs to be done manually. In an ideal scenario, these three systems should be talking to each other and information being entered only once and updated automatically in all other systems so you never need to leave your screen.

Interviewee	Main challenge /complain	Additional Details
	Inaccurate stages of probability	Choices under stage of probability field don't reflect accurately KONE sales funnel. For example, *RFQ* (request for quotation, 15%) is something that not many people use because they just provide the tender quotation and go to *tender/proposal* stage directly. Tendency is to have a lot under *tender/proposal* stage. Besides, we move from *negotiation/review* of 50% to *order agreed* which is 95%. We don't have a 75% category to indicate that we've got an understanding but we don't have it yet signed. So what is usually done is that *negotiation/review* is indicated but the probability is changed to 75%. This helps in the forecasting because at 75% is known that only some legalities or paper work is pending to be finalized.
5	*Time constrains to enter data in the system (general complain from sales people, not opportunities tab specific)*	Usually salespeople have no time to enter data right away, so is more time constrains rather than issues with the tab itself, which is otherwise easy to use.
6	*Duplicate data (general complain on KONE CRM, not opportunities tab specific)*	It has been noted that there is duplicated customer data in the system as a result of customers having multiple addresses. This happens with large companies having small subsidiaries. A better structure in CRM is required to allow having the main customer at the top level and all its subsidiaries under it. Besides, sometimes there are lots of customers under opportunity because various people from the same organization ask for a quote for the same project but at that point the end user or the end customer is still unknown so several separate entries are created. Fur-

Interviewee	Main challenge /complain	Additional Details
		thermore, it is only possible to link one single account to an opportunity so sometimes, if several people ask for a quote for the same project, you end up creating the same opportunity several times to link it to each account that requested a quote. In the future, the opportunity tab should have the main data under project but allow several accounts to be linked to the opportunity (e.g. accounts 1, 2, 3…) so you can see the full list of customers who asked for a price and be able to extract a consolidated view of the projects a client has asked us about regardless of whether we win or lost the tender or whether it was cancelled.
	Limited search functionality (general complain on KONE CRM, not opportunities tab specific)	KONE CRM search function appears to be quite limited to find consolidated data about the history of a customer. If a customer asked a quote about a particular project, you don't find that information on the account and if you do a search on it, you cannot find it under project unless KONE won the tender. If you wish to know what kind of projects a particular client has asked KONE previously about (for example, in preparation for a customer visit), it is not possible to find that information consolidated in CRM.
7	*Time-consuming* *Unnecessary/too many compulsory fields*	Not a specific complain or hard time coming from Salesforce more than salespeople saying that the tab is full of unneeded categories or information and that it takes time.
8	*Lack of synchronization with other KONE systems*	Nowadays the activities related to orders and opportunities are done completely by hand. The principal instrument in our society is SAP, but for sales teams

Interviewee	Main challenge /complain	Additional Details
		the principal instrument is CRM. CRM is only partially synchronized with SAP. So if an order is won and entered in SAP, without changing manually the status of the opportunity in CRM, the state of that order in the dashboard will remain as it is. Ideally there should be a better synchronization between SAP and CRM to allow CRM dashboards refreshing simultaneously when updates are made in SAP or vice versa.
9	*Time-consuming* *Unnecessary/too many compulsory fields*	Even only certain fields are compulsory, it may be possible to cut down on a couple of things, especially when an opportunity may not be realised.
10	*Time-consuming*	Time issue because there is a lot of information to be filled in which is already in other sources like e-mails or Team Flow.

Figure 12: World cloud of frequencies in interview round's Q1

b) Question 2 (Q2): If you would have the power to change the opportunities tab layout what would you do and why? Please mention at least 2 aspects and justify your answer.

Table 5 presents a summary of the emerging categories collected during the interview round's Q2. According to interviewees, the main proposals for simplification/further enhancements on the opportunities tab are related to *adding field description/additional details* to the tab (mentioned 2 times), *re-defining the stages of probability field* (mentioned 2

times) and to *developing interfaces between CRM and other KONE systems* like SAP (mentioned 2 times). There were also three *general KONE CRM feedback* development proposals raised during this question which are relevant for KONE CRM as a whole but not directly related to the opportunities tab. Full details of all concerns collected through Q2 are given in table 6. Figure 13, on the other hand, provides in a graphical summary (world cloud) of the emerging categories collected in this question.

Table 5. Frequencies in interview round's Q2

Category	Frequency in Q2
Make win/lost information mandatory	1
Add field description/additional details	2
Add Previous Contract # field	1
Re-define stages of probability	2
Allow having main customer and subsidiaries under it	1
Enable several accounts being added/linked to the same opportunity	1
Enable new opportunities being automatically populated out of existing data	1
Built estimate sheet into Salesforce to allow quotation being done in CRM and its data being pull to automatically populate the opportunity	1
Develop interfaces between CRM and other KONE systems (e.g. SAP)	2
Define roles in CRM and set-up views based on assigned role or business line	1
General KONE CRM Proposals • Invest on tablets for salespeople • Allow extracting reports with consolidated information of a client • Improve the speed of CRM	3

Table 6. Colour coding of frequencies in interview round's Q2

Interviewee	Proposal	Description
1	Make win/lost information mandatory	Having additional details around who KONE has lost an opportunity to and some more details about the pricing would be useful. Right now is pretty easy to simply indicate an opportunity was lost. Need to

Interviewee	Proposal	Description
		make it more demanding for salespeople to find out and provide additional details. Maybe a field for additional comments in this section would be useful.
2	*N/A*	No concrete proposals were made by this interviewee.
3	*Add field description/additional details*	Interviewee indicated not knowing about certain fields/sections or simply not using some of them as not relevant in her/his business line (e.g. *primary campaign source, Contract/Tender #, project information*). Adding a description for each field would enable people filling in the tab more accurately and better understanding the purpose of what is required.
	Add Previous Contract # field	In the opportunities tab there is a field called *New Contract #*. However there is not a *previous contract number* field so it would be useful to have that added to the tab and indicated if one exists. For example, if an opportunity would be used to renew a contract, it would be good to be able to link the new opportunity with the old one through the contract number and also to be able to use the information of the old opportunity to populate the new one. This would facilitate the process of renewing contracts.
4	*Built estimate sheet into Salesforce to allow quotation being done in CRM and its data being pull to automatically populate the opportunity*	Ideally, an estimate sheet built into Salesforce should turn into an opportunity/pull data from the estimate sheet to populate automatically the opportunity to avoid double entering.

Interviewee	Proposal	Description
	Develop interfaces between CRM and other KONE systems (e.g. SAP)	Ideally, when the status of an order in SAP changes, the opportunity should automatically be updated in Salesforce too (and vice versa) so you never need to leave your screen.
	Re-define stages of probability	Interviewee shared the sales opportunity process developed and used in Western Canada to assign the stages of probability in the opportunities tab as, according to them, there is no yet a harmonized global approach to fill in this section. This is a harmonized approach agreed within the region that could potentially be used as basis to develop a global approach for the whole KONE CRM community.
5	*Add field description/additional details*	For a salesperson is challenging to see things globally which makes it at time difficult to appreciate why certain fields are there. For example, *market segment* or *funding sector* may be fields a salesperson is not necessarily familiar with so they are not filled in correctly. This ends up in frustration if you do not really understand why you have to do it. Adding a description of what each stage is all about or a link where to find additional information about the stage would be highly beneficial.
	Re-define stages of probability	There is a need to re-define the stages of probability and to bring them in line with the on-going sales training to reflect what KONE is asking salespeople to do around the world. They should be brought into the same language that is used in the sales training given to salespeople so there is a link between the training and the stages they are at with their customers.

Interviewee	Proposal	Description
	Invest on tablets for salespeople (general proposal, not opportunities tab specific)	Investment on tablets for salespeople would be highly beneficial to allow them inputting information or checking customer data in CRM while in meetings.
6	*Allow having main customer and subsidiaries under it*	This is proposed to avoid duplicate customer data in the system coming from customers having multiple addresses (large companies with subsidiaries) and hence (multiple) separate entries in the system. A better structure in CRM is required to allow having the main customer at the top level and all its subsidiaries under it.
	Enable several accounts being added/linked to the same opportunity	In the future, the opportunity tab should allow several accounts being linked to the opportunity so you can see the full list of customers who asked for a price and be able to extract a consolidated view of the projects a client has asked about regardless of whether we win or lost the tender or whether it was cancelled
	Allow extracting reports with consolidated information of a client (general proposal for KONE CRM, not opportunities tab specific)	Being able to extract from CRM reports with consolidated information of a client, for example, in preparation for a customer visit, would be very useful for salespeople. Knowing things like what kind of projects a particular client has asked KONE previously about or the number of visits, incidents or maintenance work carried out for that client in a year would be useful to know in a visit.
7	*N/A*	No concrete proposals were made by this interviewee. However, interviewee made a comment about certain information not being systematically entered

Interviewee	Proposal	Description
		in CRM (e.g. "start on-site date/service start date" or "Project End Date/Contract End Date"). This is because this information is often entered in KTOC and sent to SAP with the enabler but not kept in CRM. Interviewee emphasized the importance of having all data in CRM, as it is the only tool that salespeople can use to access customer data and project and contracts information.
8	*Develop interfaces between CRM and other KONE systems (e.g. SAP)*	Since CRM is the unique interface between systems and an important base on which KONE organizes the relationships with its customer, this interviewee believes it would be very useful to be able to gather all information from other KONE systems collecting customer, contract or project information into CRM so for example, when a salesperson is in front of a customer or needs to prepare a visit, it is easy for him as a salesman to open his CRM and see all the information of a particular customer consolidated in one place.
9	*Enable new opportunities being automatically populated out of existing data*	For new opportunities, when creating an opportunity related to an existing customer or contract, it would be useful if, for example, the *account name*, the *market segment*, the *funding sector*, would be automatically pulled from there. Getting certain fields filled in automatically from existing data relevant for a new opportunity would save salespeople a lot of time.
	Improve the speed of CRM (general proposal for KONE CRM, not opportuni-	Interviewee indicated that their salespeople have raised concerns about the speed of CRM which need to be addressed.

Interviewee	Proposal	Description
	ties tab specific)	
10	*Define roles in CRM and set-up views based on assigned role or business line*	Interviewee proposed defining the roles in CRM better, so depending on your role, you would only see those fields that are relevant to your business line.

Figure 13: World cloud of frequencies in interview round's Q2

c) Question 3 (Q3): How would you prioritize those changes and why?

Table 7 presents a summary of the emerging categories collected during the interview round's Q3, while table 8 provides further details on what was said by each interviewee in terms of priorities under this question. Overall, this was the most challenging question from the interview protocol. Interviewees found it very challenging to speak about priorities and unfortunately, if a priority needed to be indicated, the tendency was to favour those *General KONE CRM Proposals* over those directly related to the opportunities tab. This is also a causal effect coming from the challenges experienced by most interviewees to focus on the opportunities tab rather than thinking in KONE CRM as a whole at the interviews. However, the proposal on *redefining the stages of probability* stands out as one priority (mentioned by 2 interviewees) during phase one. Figure 14 provides a graphical summary (world cloud) of the emerging categories collected in this question.

Table 7. Frequencies in interview round's Q3

Category	Frequency in Q3
Make win/lost information mandatory	1
Add Previous Contract # field	1
Re-define stages of probability	2
Built estimate sheet into Salesforce to allow quotation being done in CRM and its data being pull to automatically populate the opportunity	1
Develop interfaces between CRM and other KONE systems to allow customer data being summarized in CRM	1
Define roles in CRM and set-up views based on assigned role or business line	1
General KONE CRM Proposals • Invest on tablets for salespeople • Improve the speed of CRM	2

Table 8. Colour coding of frequencies in interview round's Q3

Interviewee	Main Priority	Justification
1	Make win/lost information mandatory	Need to rethink the win/lost section and make fields there mandatory to push salespeople to gather and record more information, especially when an opportunity is lost.
2	N/A	No preferred priority indicated.
3	Add Previous Contract # field	Currently interviewee experiences problems when trying to renew contracts because to do so you need to create a new opportunity but you don't see the old opportunity linked to it or can pull data from there, which would be very useful.
4	Built estimate sheet into Salesforce to allow quotation being done in CRM and its data being pull to	The estimate sheets built into Salesforce and opportunities created automatically out of the estimate sheets' input would be this interviewee's priority number one. The moment you get away from using spread sheets outside Salesforce, you get rid of

Interviewee	Main Priority	Justification
	automatically populate the opportunity	some duplications, save a massive amount of time for salespeople and get them excited about using Salesforce again instead of just having to use it because they have to.
	Re-define stages of probability	Second priority is related to the stages. Some clarity on what the stages represent. Need to develop a document where it is clear the milestones that need to be achieved at each stage. This document should be shared across the whole CRM community and implemented and followed globally.
5	*Invest on tablets for salespeople (general proposal, not opportunities tab specific)*	This would allow salespeople inputting information or checking customer data in CRM while in meetings, reducing their administrative burden and allowing them to spend less time in the office and more meeting customers.
6	N/A	No preferred priority indicated.
7	N/A	No details provided at interview. Requested time to check with salespeople in her/his team before providing input but no further feedback received.
8	*Develop interfaces between CRM and other KONE systems*	One example here would be developing interfaces that would allow importing in CRM the historical information related to the maintenance from KONECT. Because when a salesperson is in front of the customer, it happens very often that the customer asks when the last service activity was done, or what was found on the last technician visit, or how many visits were done last year. It would also be important to have there all the details related to collecting credit or the history of the extraordinary jobs already done on a lift. Having this information easily accessible and consolidated in CRM would

| Interviewee	Main Priority	Justification
		allow salespeople building the conversation relating to the existing problems and creating new opportunities during client visits. It will also save them time at the office to create more opportunities and tenders.
9	*Improve the speed of CRM (general proposal for KONE CRM, not opportunities tab specific)*	Interviewee thinks speed should be priority number one because if the system is slow, people lose confidence on it and nobody feels like using it. Productivity is also lessening if speed is not improved.
10	*Define roles in CRM and set-up views based on assigned role or business line*	Setting up views of the opportunities tab based on assigned role or business line would be beneficial to avoid seeing unnecessary fields not needed to be filled in for certain business/area.
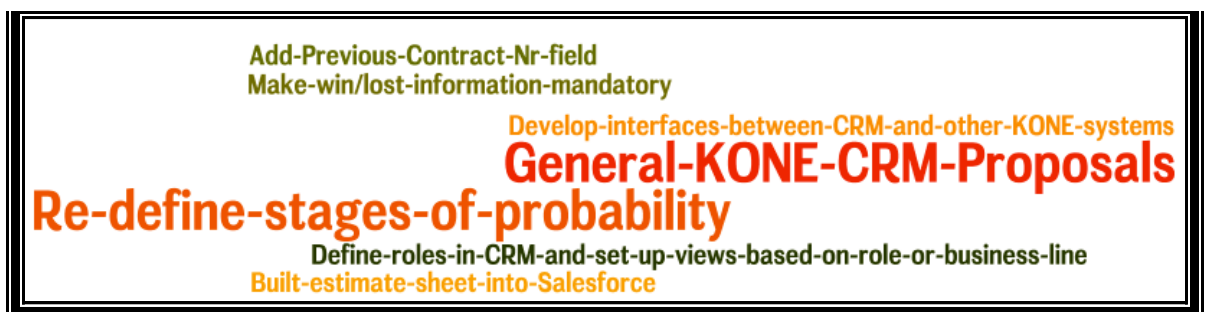
Figure 14: World cloud of frequencies in interview round's Q3

d) Additional comments from KONE CRM end-user survey and other feedback

As mentioned earlier, the last 5-10 minutes of each interview were reserved to discuss the main issues/topics identified during the KONE CRM end-user survey completed by each interviewee in preparation for the interviews. Table 9 presents the main items discussed with each interviewee as a follow-up of the online survey and any other feedback collected at the sessions.

Table 9. Additional comments/feedback collected during interview round

Interviewee	Comment	Description
1	*None or very seldom CRM Training*	Some training for the sales managers is required. There is not any on-going training program where people can sign up. People are not trained to improve further or to use the tool to explore potential. Newcomers usually learn the (bad) practices from other colleagues or learn by themselves from spending hours going into the tool and trying out things. Interviewee expects that a training program conducted by the KONE CRM global team is develop and conducted on a regular basis.
2	*None or very seldom CRM Training*	From a newcomer point of view, there doesn't seem to be any consistency on how people use CRM because each person uses it differently than the next person. There is not an on boarding training to teach newcomers what the best practices are and how things should be done religiously.
3	*CRM is a powerful and useful tool*	Despite it may ask a bit more information needed, interviewee can overall see KONE CRM's benefits and sees it as a very powerful and useful tool.
4	*N/A*	No additional comments given
5	*Management should encourage a more systematic approach to the use and a change of mindset about the benefits of KONE CRM*	According to this interviewee, the reason why certain information that should is not recorded in CRM (e.g. telephone calls) is because people is not really encouraged by their management to fill that in and because people is not explained why certain information is needed or what is used for. So if people don't see who would benefit from having certain information on CRM and instead would add to a salesperson's workload they won't do it. Management should play a better role in making salespeople understand that CRM is a tool to empower

Interviewee	Comment	Description
		them in the sales process not just a tool for the management to extract reports. Need to change the mindset about CRM.
6	*None or very seldom CRM Training*	CRM training is very seldom and is lacking to link CRM with your job and you role in the organiza-tion; to understand your business line; and to help you realising how you can really utilize it in your role to make the best use of it.
7	*Very good support received so far from the Global CRM team*	Interviewee expressed their satisfaction with the support received so far from the Global CRM team.
	Instructions and training material require further im-provements	Lots of instructions but not always very easy to un-derstand. Interviewee suggested to have a shorten version or shorten user guide/manual for begin-ners, something like CRM for dummies.
8	*N/A*	No additional comments given
9	*None or very seldom CRM Training Poor cascading of information from key users to end users*	Interviewee indicated that CRM training is an issue of concern in their region. At the moment Caroline Bondier (CRM Solution Owner) is sharing monthly updates with all key users. The sessions are very informative, where new functionalities or new en-hancements are presented. However, interviewee has observed that not all key users have the same level of understanding of CRM and therefore, not all be up to the level to understand what Caroline is presenting at the sessions. Interviewee indicated that in Asia what typically happens is that being a key user is an additional duty added on top of all other duties and often the person assigned may not even have been trained at all. This person may be

Interviewee	Comment	Description
		given this task because is a service manager or because of his rank or position, but may not even know anything about CRM. This also affects the cascading of information from key users to other users. Most of the information is being lost or not passed along because of the lack of understanding from the key users. And even if the training materials are shared after the session, the key users' skill level and the time constrains make it very difficult for him/her to communicate the outcome of the sessions to other users.
10	*N/A*	No additional comments given

6.2 Focus group phase: description and main outcomes

A face-to-face focus group was organized in KONE offices in Chertsey, United Kingdom (UK) on 14th of November 2014 as a follow-up from the first interview round. The session had 2 main objectives:

- Validate the results from the first interview round (key emerging themes collected) and;
- Collect further ideas/feedback/development proposals to simplify or further improve the KONE CRM opportunities tab & share experiences around that

5 UK sales executives took part in this exercise and the author of this thesis project acted as Moderator of the session. Participants were nominated by their respective Area Managers in agreement with the Sales & Marketing Director of KONE Chertsey. All participants were required to have a fairly good knowledge and experience using KONE CRM in their sales activities. Table 10 summarizes the focus group participants' profiles:

Table 10: Focus Group Participants' profile table

Respondent #	Gender	KONE Location	Business Line	Average KONE CRM weekly login time?
1	Male	United Kingdom	Maintenance (SEB)	>6 hours
2	Male	United Kingdom	Maintenance (SEB)	>6 hours
3	Male	United Kingdom	New equipment (NEB)	>6 hours
4	Male	United Kingdom	New equipment (NEB)	>6 hours
5	Male	United Kingdom	Modernization (TRB)	>6 hours

During this second phase, the author put in practice a new approach to address 3 key challenges identified during the first phase: firstly, a face-to-face second round was considered a must as only telephone contact with interviewees was possible during the first round. This was due to them being spread all over the various KONE locations around the world. As the author was then based in UK and UK is a significantly important market for KONE business, it was decided to have the face-to-face focus group in KONE offices in Chertsey, UK; secondly, having the second round in UK removed the language gaps faced during the first round in terms of English language skills as all focus group participants were English native speakers. The author noted that, by removing any potential language barriers, the discussions were more open and dynamic and the speech more clear and concise than in the first telephone interviews round. Finally, having face-to-face interaction enabled the moderator to benefit from the audience's non-verbal communication. Besson et al (2005) define non-verbal communication as follows:

"Non-verbal communication consists of all the messages other than words that are used in communication. In oral communication, these symbolic messages are transferred by means of intonation, tone of voice, vocally produced noises, body posture, body gestures, facial expressions or pauses. When individuals speak, they normally do not confine themselves to the mere emission of words. A great deal of meaning is conveyed by non-verbal means which always accompany oral discourse – intended or not. In other words, a spoken message is always sent on two levels simultaneously, verbal and non-verbal."

Being able to read participants' facial expressions, body language, intonation and other non-verbal signs, not possible during the first round, allowed the Moderator to better understand and interpret her audience's positions and drive the discussion towards a more fruitful outcome. "A. Barbour, author of *Louder than Words: Non-verbal Communication* states that the total impact of a message breaks down like this: 7 percent verbal (words), 38 percent vocal (volume, pitch, rhythm, etc.) and 55 percent body movements (mostly facial expressions). This breakdown indicates that effective non-verbal communication skills are essential" (Sama, 4).

In preparation for the focus group, each participant was asked to complete the online (Webropol-based) KONE CRM end-user survey also used in the first interview phase. The results of this second survey are summarized in appendix 5. The session, which took approximately 2 hours, followed the pre-defined agenda below and had a primarily qualitative approach:

1. Participants' introduction (name, role at KONE and KONE CRM experience)
2. Introduction by Caroline Bondier, thesis project sponsor (background and motivations for topic selection)
3. Research scope, objectives and selected themes from first interview round by Diana Parada
4. Focus group discussion lead by Diana Parada. Pre-defined discussion questions were as follows:
   - *What do you think about the themes that emerged from the first interview round? (Tour de table)*
   - *Which one would you support the most and why? (1 – 3 grade scale exercise)*
   - *What other simplifications/further enhancements would you like to see implemented in the opportunities tab and why? (Affinity Diagram[13] exercise)*
5. Conclusions and Q&A lead by Moderator

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[13] "An **affinity diagram** helps to synthesize large amounts of data by finding relationships between ideas. The information is then gradually structured from the bottom up into meaningful groups. From there you can clearly "see" what you have, and then begin your analysis or come to a decision" (*MindTools*).

The session started by each participant taking a couple of minutes to briefly introduce themselves, their role at KONE and their knowledge/experience using CRM. This was followed by a few words from *Caroline Bondier*, sponsor of this thesis project, on the background and main drivers to sponsor this work. After that, the Moderator briefly presented the overall research scope and objectives, the outcome of the first interview round & the main emerging themes, and the objectives & methodology to follow throughout the focus group. Once participants were walked through the key elements of the study and the purpose & main objectives of the focus group discussion, the Moderator followed the pre-defined phase two agenda to collect further input from participants. Appendix 6 includes the Power Point presentation prepared by the moderator to support the session. Below is a summary of the main discussions, comments, opinions and feedback collected during phase 2:

a) **What do you think about the themes that emerged from the first interview round? (Tour de table)**

The main comments collected from participants around this question are as follows:

1. Make win/loss information mandatory – participants agreed on the relevance of this item but made no further comments on it.

2. Add field description/additional details – participants agreed on the relevance of this item but made no further comments on it.

3. Previous Contract # field – one participant mentioned that he knows those colleagues in his department in charged of contract renewals and he´s aware of their frustration when renewing existing costumers´ contracts and having to repopulate fields already existing in the old opportunity into the new one. Therefore, he was in favour of this development proposal. However, another participant raised a concern that doing so assumes that the old and new contracts are the same so if you are not signing exactly the same thing and the old and new contracts don´t match, this approach can pose a risk of wrong information being automatically filled into the new opportunity. He gave an example that if an old contract is for 4 lifts and the new one

for 5, bringing automatically the old data into the new contract may lead to miss one lift. In his view, the idea is not perfect in itself but has good potential and requires careful consideration of what should/should not come automatically.

4. Re-define stages of probability – on average all participants were in agreement that they do not use some of the stages of probability currently listed in the opportunities tab. For instance, *"RFQ – request for quotation, 15%"* is often not used because whenever a quotation is requested, people tend to go straight away to the next stage of *"Tender Proposal"* and most of the opportunities are often under that stage. However, one of them also acknowledged that some do use *RFQ* for communication purposes. For example, if an Engineer goes to a Customer Service Manager and says they need to have a ladder for an elevator, this gets put, in his opinion, under *RFQ*. Another case discussed was jumping from "*Negotiation Review, 50%*" to "*Order Agreed, 95%*".

In the first interview phase, a Sales Manager from Canada questioned how one can jump from 50% to 95% without a stage in the middle (e.g. 75%) indicating, for example, that there is an understanding that the order will take place but there are some legalities to be resolved. One focus group participant raised his concern on this matter. He mentioned that he would like to avoid as much as possible having to come back to CRM and change stages because this can lead to out-dated information and reporting. In his opinion, the simpler you make the stages, the easier it gets to report on them. It was agreed among participants that the views on this item may diverge based on whether you are a Salesperson entirely focused on the outcome (sales) and a Sales Manager having to report on the evolution and probability of sales and forecast in accordance.

5. Allow having main customer and subsidiaries under it – participants agreed on the relevance of this item but made no further comments on it.

6. Enable several accounts being added/linked to the same opportunity – One participant mentioned that this approach would be useful to trace past opportunity traffic. He stated that it would allow salespeople, for instance, to extract from KONE CRM

an overview of all activities/relationships KONE has had with a client in the past (e.g. # of quotations) regardless of which department/segment of the client company requested the information. This would be very useful data when meeting a client to negotiate a potential contract/project and to better understand and establish good and long-lasting relationships with them when the salesperson is able, from existing data, to further explore the client´s requirement and needs to increase the sales probability of a potential contract.

7. Enable new opportunities being automatically populated out of existing data – participants agreed on the relevance of this item but made no further comments on it.

8. Built estimate sheet into Salesforce – one participant stated that they do the estimate sheet in KTOC, a kind of next step into CRM. Another one also mentioned BP Tender Tool being used, a web-based pricing tool. Overall participants seemed to be satisfied with quotations made in KTOC, one specially highlighting the great importance it plays in their business, but also overall participants acknowledged the potential of having only one place where to enter and maintain data without having to leave your screen, which would be possible if having estimate sheet being built into Salesforce. One participant also acknowledge that because in his business line (i.e. Modernization) they have very strong and defined product lines, it is rather easy for them to price them as there is only certain amount of options available, while this may not be the case in other business lines where pricing can be rather a long and painful process jumping from one screen to another one.

9. Develop interfaces between CRM and other KONE systems – overall, participants acknowledge that many efforts on this have already been started and many things that couldn´t be done before can already be done today to certain extent. Nevertheless, there is still a lot of work to be done in this area. For example, one participant mentioned that they have asked several times to link CRM to Outlook because if, for instance, they have a visit which is a business activity linked to a KPI, invitations and diaries are kept within Outlook but cannot be linked to CRM or doesn´t work very well for them. However, another participant stated that this is already possible but you need to download "Salesforce for Outlook". This participant agreed to

show those not yet knowing how to get this functionality working. Nonetheless, it was agreed that the problem still remains with *calls*, which you cannot yet link to an opportunity. One of the participants also gave the example of Apple Iphones and Ipads, which allow that when you have a meeting scheduled with a client, your current location in the map against your client´s address can be tracked through your devices. In these events, Apple tells Salesforce where the person is in the map and Salesforce automatically changes the status of the visit as *in progress*. Unfortunately this functionality is not currently possible with those phones provided to KONE sales people.

Another point raised here by one of the participants overseeing the Maintenance department is the inefficiency in some of the processes: he mentioned that he gets an average of 60 orders a quarter (about 20 per month) and at the moment he has 3 orders sitting in *work in progress* but the processing department cannot proceed with the orders as they required a separate form filled in and submitted to them even all details are already in CRM. This, in his opinion, is an inefficient system as he spends most of his day in customer visits and he often doesn´t have the time to deal with all this additional administration on a daily basis. Besides, he notes, the lack of more adequate tools (e.g. better equipped phones or tablets) prevents him from addressing these issues in between visits having all to wait till the end of the day once he is back to the office. With this, he mentions, not only he suffers with the overload but also his other customers (i.e. his Engineers) because their orders, which are otherwise ready to be submitted in CRM, cannot be processed further in a timely matter due to incomplete administration waiting at his end.

Concerns were also raised around building strong interfaces between CRM and SAP because, for instance, when an order status in SAP changes, the salesperson should also go to KONE CRM to update the status of the order there rather than having this automatically updated once the change is done in SAP.

10. Define roles in CRM and set-up views – participants agreed on the relevance of this item but made no further comments on it.

b) Which one would you support the most and why? (1, Low – 3, High - grade scale exercise)

The main comments collected from participants around this question are as follows:

Participant # 1:

3 points to item 8 - Built estimate sheet into Salesforce: according to this participant, instead of having different tools for quotation, one being the PPT tool, it would be very beneficial to build the estimate sheet into Salesforce. In this way, you would have all your opportunities, all your estimates and all your pricing behind the final quote sitting centrally within the opportunity instead of sitting somewhere else within the system, as it is the case now.

2 points to item 9 - Develop interfaces between CRM and other KONE systems: this participant emphasised on the importance of improving existing interfaces between CRM and other KONE systems and developing new ones. He highlighted once more the importance of improving the interface between Outlook and CRM and the possibility of having calls being automatically synchronized so the records of communications to customers are kept centrally in the opportunity instead of sitting somewhere else without ways to measure them or track them. He mentioned that currently you can link Salesforce with your calendar but it only works for visits, while all records of communication in itself with the customer (e.g. e-mails, phone calls) are being left aside. Being able to measure this communication is crucial for this participant as he has a Key Performance Indicator (KPI) related to this that could be easily measured if this interface would be in place.

1 point to item 10 - Define roles in CRM and set-up views: in this participant´s opinion "a cleaning of the screen" is needed because when you go to the opportunity tab you have many different fields which you if you don´t have to fill them in, they should not be there. For *Project Information*, for instance, a couple of fields would suffice to enter the most important details but instead we have about 10 fields to complete. This should be revised. What also frustrates this participant is that some fields like *Have you done a pre-*

tender review?, of not major relevance for them, should be filled in or ticked to be able to save the opportunity. In his opinion, the main items should be brought up to the top of the screen without having to scroll-down if these are really relevant for the organization. So ideally, whatever is chosen at the top level of the screen would define what you see if you scroll further down.

Participant # 2:

3 points to item 6 - Enable several accounts being added/linked to the same opportunity: this participant believes that this would be very useful to avoid having to go over and re-visiting and re-populating the same fields every time we are dealing with different parts/departments of the same organization/client.

2 points to item 9 - Develop interfaces between CRM and other KONE systems: this participants pointed out that he doesn´t understand why KONE has all these stand-alone systems not sufficiently talking to each other. He mentioned having sat with one of his colleagues in an exercise to see how she books orders and what he observed was that she was constantly jumping back and forth from screen to screen, from SAP to CRM and from CRM to SAP. He doesn´t understand why systems haven´t been set to self-populate the same fields in all required instances if already entered in one system. This would be possible if the right interfaces are developed.

1 point to item 10 - Define roles in CRM and set-up views: this participant believes that there are way too many fields in the opportunities tab and even it is true not all are compulsory, he is of the opinion that the information to be filled in should be more focused on what is really important based on the nature of your role. The information that you fill in at the very top of your screen should define the fields to complete once you further scroll down or the boxes that appear once you select a particular option.

Participant # 3:

3 points to item 6 - Enable several accounts being added/linked to the same opportunity: this participant supported the views of participant # 4 on this item. In his

opinion, if you can link several accounts into one opportunity you can avoid repetition of data and copying data over several times.

2 points to item **9 - Develop interfaces between CRM and other KONE systems**: this participant is especially interested in seeing better interfaces being built between SAP and CRM for the reasons discussed earlier. In his opinion, there are lots of data that they get pushed on to fill over and over which is fully available in other instances. CRM should be able to talk to many different systems and one should not be asked to fill in separate forms with information already existing in CRM.

1 point to item **10 - Define roles in CRM and set-up views**: this participant agrees with participant # 1´s position on "cleaning up the screen". He is of the opinion that CRM views should be defined based on the nature of the activities of each individual and fields should automatically be pre-filled if they are often the same. He gave the example of "*KONE Project ID*" field for which his team has been advised to put an "A" on it because they are an "A" process. He mentioned that having to do so is frustrating because all projects they do are always "A" so why is the system not understanding and pre-filling that in automatically when a new opportunity is created by people in his team. Nevertheless, he acknowledged that this is a particularity for UK business, as it appears UK is the only KONE country having both "A" and "B" businesses and hence this is needed, among many things, for reporting purposes. He also stated that if this information is really needed, it should be made compulsory or otherwise get rid of it.

Participant # 4:

3 points to item **7 - Enable new opportunities being automatically populated out of existing data**: This participant thinks that the opportunities tab management can be sometimes tedious, specially when having to do a lot of opportunities at once. Therefore, in his opinion it would be ideal if one could for example, simply enter the *Equipment* # and the *Lift ID* # into CRM and the system would automatically pull in the information to say it is this customer (as the data is already in SAP) and pre-populate most of the information for you in the opportunity. In this way, only a few changes/additions

would be needed. This would save users lots of time that could be dedicated to other activities.

2 points to item **6 - Enable several accounts being added/linked to the same opportunity**: recently this participant has been doing quotations for a client on one of their products. One department of the client company asked for the quotation, but it happened that afterwards, another department (i.e. Construction) within the same company asked for almost the same quotation. This would normally require a second opportunity to be created but it would be easier if one could just have a single opportunity with all the accounts linked to it and full details of past activity easily accessible.

1 point to item **9 - Develop interfaces between CRM and other KONE systems**: this participant believes that if better interfaces between CRM and other KONE systems like SAP would be developed, this would also help in the auto-population of data and prevent from having out-of-date information in CRM. He pointed out that often an order may have already been marked as lost in SAP but not updated in CRM, which leads to confusion and misleading reporting. However, if proper interfaces are established between these 2 systems, the moment one updates the status of an order in SAP, CRM should automatically be updated without you having to do any manual changes.

Participant # 5:

3 points to item **9 - Develop interfaces between CRM and other KONE systems**: this participant used to be a Sales Trainer before joining KONE and used to go around different locations to attend sales innovation events. One of his favourite sayings is that "to increase your sales, double your sales activities" and that is, in his opinion, the trick to it because the more time salespeople actually spend in front of the customer, the more outcome can created but often they don´t have enough time to be with their customers. Having to deal with too much administration in CRM and constantly having to copy over things from one system to the other takes them away from being in front of their customer and can eventually affects sales. This participant believes he could do 25% better if systems would work more efficiently at KONE and the administration behind would be reduced. For him, CRM is his life, his dashboards are his KPIs and his

opportunities the basis on which he prices and sells. If everything could be done in CRM only, it would make his life so much easier and free 25% of his time to dedicate to clients, which could potentially result into more sales.

2 points to item 6 - Enable several accounts being added/linked to the same opportunity: according to this participant, KONE gets lots of Facility Management (FM) companies tendering for the same job which makes this an item of importance. Imagine there are, for example, one building and one opportunity linked to it but several FM companies trying to win that contract. They all approach KONE for a quote on a particular lift as part of their tender process. But KONE cannot know who will win/won the order so salespeople are often in a situation where they have to contact several parts of the same company and call different departments to get additional information and all get involved in it. It would be useful to be able to link several accounts into the same opportunity if applicable, to manage more efficiently the quoting and pricing processes and overall communications with the client. It would make things faster and smoother and generate more time for sales.

1 point to item 1 - Make win/loss information mandatory: this participant considers this item relevant because once a year, the Directors of KONE (the Board), have to set prices for next year based on win and lost reporting made by salespeople. If in several cases it is indicated that an opportunity was lost because of price, it can be a signal that our prices are not market-competitive or perhaps our prices are wrong. Therefore, it is important to report as accurately and detailed as possible on this as reports are generated on the basis of that. Those reports will define the company´s position in the market for the following year, therefore their great importance. They could give a good picture of what is going wrong or what the company is doing well. According to this participant, the drop-down box is fine but it may require more description about it. The challenge here, according to another participant, is that sometimes you are not even told if you won or not a tender and if you lose it, they don´t always share who won it and for how much or simply give you wrong information to get rid of you. However, it is acknowledged that in at least 98% of the cases an opportunity is lost to price so having more detailed and accurate data on win/loss information can help the company establishing its future position on price for the next year.

Table 11 below summarizes the ratings of all focus group participants on the themes identified within the first interview round. In their opinion, 6 - Enable several accounts being added/linked to the same opportunity and 9 - Develop interfaces between CRM and other KONE systems are the ones requiring most attention and seen as highly beneficial changes to further enhance the opportunities tab and optimize the opportunities management at KONE.

Table 11: Summary of focus group participants' rating on first interview round themes

Theme	Rating from 1 (Low) – 3 (High) on first round's selected themes					
	P1	**P2**	**P3**	**P4**	**P5**	**Total**
1. Make win/loss information mandatory					1	**1**
2. Add field description/additional details						
3. Previous Contract # field						
4. Re-define stages of probability						
5. Allow having main customer and subsidiaries under it						
6. Enable several accounts being added/linked to the same opportunity		3	3	2	2	**10**
7. Enable new opportunities being automatically populated out of existing data				3		**3**
8. Built estimate sheet into Salesforce	3					**3**
9. Develop interfaces between CRM and other KONE systems	2	2	2	1	3	**10**
10. Define roles in CRM and set-up views	1	1	1			**3**

Overall, participants agreed on the validity and relevance of the themes emerged during the first interview round and acknowledged that KONE CRM in itself is a great system but as a company there is still work to be done to maximize its potential and reach optimal levels of efficiency and data accuracy.

c) What other simplifications/further enhancements would you like to see implemented in the opportunities tab and why? (Affinity Diagram[14] exercise)

As an outcome of the *Affinity Diagram exercise* conducted during the focus group discussion, 4 categories of simplifications/further enhancements into KONE CRM´s opportunities tab and opportunities management at KONE emerged. These 4 categories, known within the theory of the *Affinity Diagram* as *Affinity Diagram Headers*, are summarized under Figure 15. Further details on each item raised follow right after:

a. Simplified / Enhanced Fields	b. Interfaces across KONE systems & CRM	c. Adequate / Correct Tools	d. Sales Management / Strategy Improvements
• Top 10 customers display by business line • Enhanced clone opportunity option • Enhanced *Next Step* field • Win/Loss link comments • News flash of orders received • Populate *Opportunity Name* also in the address box • Product field (equipment) • Colour code the screen to link with roles • Only managing fields specific to job role	• Use *Equipment #* to populate customer information already in SAP • Win submit button to SEB • Ability to add/edit whole estimate sheets and hold documents, spread sheets and photos on CRM • Link C4L reports so other business lines can use it • C4L request button • CRM used as single point of access to all KONE database • Link lift information from SAP	• Button to send contact details of customer to phone, etc. • Interface KONE mobiles with CRM • Phones and tablets	• CRM linked to Google Maps to enable graphic overview of current, lost and prospective customers • CRM market research

Figure 15: Post focus group discussion's development proposals

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[14] "An **affinity diagram** helps to synthesize large amounts of data by finding relationships between ideas. The information is then gradually structured from the bottom up into meaningful groups. From there you can clearly "see" what you have, and then begin your analysis or come to a decision" (*MindTools*).

a. Simplified / Enhanced Fields

Top 10 customers display by business line: one participant suggests to set up a sort of live report that would show you always which are your top 10 customers. There is probably already a way to extract such a information from KONE CRM but the idea is to have something fast and easily accessible, always showing somewhere in your main screen and updating live on a regular basis based on the evolution of your sales. This reporting should also allow filtering in various ways, for instance, by time spent on the client and by amount quoted.

Enhanced clone opportunity option: it is common practice at KONE to share opportunities across different business lines whenever potential additional leads in other areas are identified. For example, sometimes it happens that a salesperson is quoting for a lift maintenance and in the process gets to know that the client is also interested in a pair of doors. When this happens, what the maintenance salesperson would do is to clone her/his opportunity in CRM and send it off to the Doors department to have that followed-up directly with the client. However, this practice is not sufficient in itself as, besides cloning the opportunity, the maintenance salesperson should always e-mail somebody in the doors department providing them some additional background information on the case. The reason for this is that once you clone the opportunity, it is not possible to make changes or add comments for the next person so everything needs to be followed up with a separate form of communication as the system doesn´t support this option. Allowing editing the cloned opportunity before sending it off to the next department would not only make the process more efficient but also save lots of time from salespeople to dedicate to customers.

Enhanced Next step field: one of the participants was asking others what is the *Next Step* field under *Probability* all about. It seems that many users tend to fill in the *Stage* and *Probability* fields but not the *Next Step* field. The purpose of this field is, apparently, not well understood, but if it is a way of planning and managing what is going on, there is, in one of the participants´ opinion, more it can be done with it like serving as guidance. This participant proposed to have the *Next step* field enhanced in such a way that if, for example, you´ve quoted, the *Next step* field would propose you a set of suggestions like

follow-up call in 2 days or *call next day* if the customer has any questions. Something like a diary or a task box that when one clicks on it, it shows a drop down menu with alternatives of what to do next and automatically sets tasks in one´s calendar or reminders. Furthermore, it would be useful to add a comments box besides the field so if the customer, for example, tells in advance that he is not ready to place any orders before 9 months, this is recorded there and helps sales people planning their work and future tasks more efficiently.

Win/Loss link comments: this proposal is about allowing additional comments to be added once an opportunity is marked as won or lost, for instance in a comments box, so Management can see exactly why an opportunity is won or lost. Even if it is true that the reason for a lost opportunity is often linked to price, there may be cases were other reasons are behind and it would be important to have those details recorded in the right place. Furthermore, if salespeople are taking the time to put that information into the system, it should be ensured that Management are looking at it carefully and using it as input for decision-making.

News flash of orders received: this proposal implies setting up a news flash of orders received by business line to communicate when a new order has been placed. This could work, for example, in the main screen saying that X or Y employee has just received an instruction for recent wins. This is, in one of the participants´ opinion, a very good idea to spread the good news across the company, recognize the work of the employee in question and motivate other employees towards working hard to achieve future goals. It is believe this could have an impact on employees´ motivation and engagement towards the company and to push other employees to give the extra mile towards future targets. Wins should, in his opinion, be something communicated on a regular basis.

Populate Opportunity Name also in the address box: when one selects *New Equipment (NEB)* in the *Business Type* field while creating an opportunity, the box under called *Opportunity Name* will prompt you to enter the full address of the client. However, if you scroll down to the *Site Information* Box, you will see that the same information (e.g. site street/address, site Zip/postal code, etc.) is asked once more under this box. This proposal is for having all information already entered under the *Opportunity Name* field au-

tomatically populating the *Site Information* fields instead of having to double-enter this information manually.

Product field (equipment): there is a *Product field (equipment)* in the opportunities tab that salespeople should be looking at everyday, but it seems not to have all portfolio options available to select from. If at the top of the screen one clicks on *Business Type*, selects *NEB* and goes to *Product/Service Interest*, the options there don´t seem to include all portfolio options for this area. Sometimes it may not be an escalator or an elevator but a lift platform but that option cannot be found under the NEB options. This should be corrected and options being updated in accordance.

Colour code the screen to link with roles: the idea here is that if KONE CRM needs to keep a single standard template with fields which may or may not be applicable to one business line, it would be good to colour code the screen to easily identified the fields specific to a particular role (e.g. green for TRB, red for NEB, etc.) instead of having everything in plain blue. This would give you a visually better understanding of what you are required to fill in.

Only managing fields specific to job role: it would be useful, for example, that when searching in KONE CRM for a client, one would only see what is related to her/his own business line (e.g. NEB) instead of seeing everybody´s stuff. It is ok to be able to see afterwards the client related information to all business lines but at first, one wants to concentrate on her/his business line and to see opportunities in her/his own business line only. An option here would be to incorporate a drop down menu in KONE CRM that allows you to sort opportunities by business line or when within a client, being able to sort opportunities for that client per business line.

b. Interfaces across KONE systems & CRM

Use equipment # to populate customer information already in SAP: it would be ideal if one could for example, simply put in an *Equipment #* and the *Lift ID #* into CRM and the system would automatically pull in the customer´s information (already in SAP) and pre-populate most of the information for you in the opportunity so only a few chang-

es/additions are needed at the end. This would save users lots of time that could be dedicated to other sales activities.

Win submission button to SEB: currently, when an order is won, one should click on *Win* in the opportunity and in parallel, should fill in a so-called *SEB submission form* with the same information already contained in the opportunity and the opportunity number so the order can be processed further. This form is counterchecked against the opportunity, and if something is wrong or missing, it is returned back to the requester for changes. These last steps should, in participants´ opinion, be removed and make it possible that once somebody marks an opportunity as won in CRM, one can simply click on the *submit button* and the order goes automatically further for processing without need for additional middle steps.

Ability to add/edit whole estimate sheets and hold documents, spread sheets and photos on CRM: currently in the market there are platforms like *Google Sky Drive* where you can add or edit, for instance, word and excel documents, and exchange documentation with counterparts and all is sitting in the cloud accessible 24/7 from any location as long as there is an internet connection. You don't need to have a computer with Microsoft Office but word and excel are all incorporated in the cloud and many people can have access to this location at the same time (something somehow similar to the way *SharePoint* operates). It would be useful if CRM could be set to work in this way so people could work on any file from any type of device without restrictions.

Link Care for Life (C4L) reports: this proposal is about enabling the option of uploading C4L reports to CRM because sometimes Portfolio Managers offer this to customers but the C4L has often already been done. Having this option would allow other business lines to check directly whether a C4L has already been carried out and to have access to all related information to that if needed. One participant suggested having here a so-called "traffic light" showing once the C4L has been done (*green* for completed; *orange* for in progress; *red* for not started). Alternatively, a "tick box" could also be used. If ticked, it would mean that C4L has already been carried out and a comments box besides it could be used to record any additional details.

C4L request button: at the moment, if somebody wishes to have a C4L done, she/he would need to e-mail or message down the person in charged of this task and provide her/him all customer details already in CRM once more. So what is proposed here is, for instance, that once somebody presses this *C4L request button*, the system automatically e-mails the person in charged of this task and clones the opportunity or sends a direct link to it allowing additional comments to be added. And once completed, if the previous "traffic light" suggestion is also implemented, the person could change the light to *green* alerting the requester that C4L has been completed (the requester would also receive an automatic e-mail or alert informing her/him about it). This would save lots of time and effort to all parties involved.

CRM used as single point of access to all KONE databases (Outlook, Tender Tool, C4L, P:Drive, expenses, car usage): the idea here is to allow accessing all KONE databases through CRM and/or empowering CRM with functionalities that up till now have been managed through a separate system. As CRM sits on the cloud and can be accessed from any location as long as you have a device with Internet connection, it would be very useful if one could use CRM to send e-mails (interface with Outlook), do estimates and prepare tenders (interface with Tender Tool). Besides, instead of the P:drive, there would be a centrally held location accessible through CRM where all sales, project management and general management documentation is stored. Furthermore, it would be ideal if CRM would be established as the single location to enter and centralize all your personal expenses claims and also to enable the system to, through your devices, track where you have been and how many miles you have done (visits) so you no longer have to fill in those tedious forms to report, for instance, on car usage on a monthly basis. Care for Life (C4L) should also be linked to CRM to ensure all information on this respect is automatically available in CRM.

Link lift information from SAP: lift information, currently available only in SAP, should also be brought to CRM as this is information one needs all the time, for instance, to prepare quotes, and it would be useful having it in CRM linked to the opportunity.

c. Adequate / Correct Tools

Button to send contract details of customer to phone, etc.: it is proposed to add a button in CRM that if one clicks on it, it clones and syncs the customer details contained there into KONE Windows mobiles and automatically adds them to contacts in the phone. This is already possible with Apple´s mobiles but doesn´t seem to work very well with Windows mobiles. Furthermore, this participant hopes that once there is a meeting in one´s calendar with a client, the mobile would also sync into the invite the details of the client for easy access prior and/or after the meeting.

Interface KONE mobiles with CRM: it would be good if one could log into her/his phone and be able to access all data, for instance related to a visit, because CRM is fully accessible and supported in all KONE Mobiles.

Phones and tablets: as per participants´ input, the phones and tables currently being provided to KONE Salesforce are not sufficient to support the business and the sales activities. For instance, they don't support CRM for which participants request KONE management to look into alternatives to overcome these challenges.

d. Sales Management / Strategy Improvements

CRM for market research and *CRM linked to Google Maps to enable graphic overview of current, lost and prospective customers* ultimately, all CRM data for current contracts, lost contracts, opportunities or jobs for a particular business line are all sitting in CRM and linked to a postcode (location of the client company). Therefore, it would be useful if KONE CRM would interface with Google Maps so one could get a map, for example, of Chertsey (UK) and get a visual overview of what contracts are being looked after in Chertsey area, which ones have been lost to the competition and which ones could be potentially won on new business. This would serve as basis for understanding the market landscape in the area and planning future sales strategies in accordance. It would also be useful to see in a map what contracts were lost next door (in other business lines), because at times it seems people across business lines are not talking to each other and sharing ex-

perience. The idea is to utilize existing opportunities´ data to maximize the probability of win on existing opportunities and explore potential for new leads.

Focus Group Conclusions and Q&A lead by Moderator

The session concluded with some final comments/remarks from participants on their overall experience throughout the focus group exercise and their views on the potential of input being gathered as part of this development project. Below are some of the main comments received:

"Once you put the system into pieces, you realise there are lots of ideas that could make users´ life so much easier".

"It was a good exercise because we´ve really never had the opportunity to talk this openly about potential improvements in KONE CRM. It´s interesting to see how many users share the same frustrations. You are never alone in the CRM world".

"The main thing I´ve taken away today is that collecting information about what needs to be done is really being done in the right way and we are all working towards improving efficiency in our sales processes which should always be a top priority at KONE".

"We are collecting information in way too many places and not putting them all together where it should be (CRM) so the tool should be simplified. We´ve got to certain stage and we need now to take it further and not sit down in what we´ve done so far".

"It´s good that the system is been review by end-users and eventually being improved. It already works but it has potential to work even better so we need to continue working towards that goal".

"KONE CRM is a good tool but needs updating, brought up to improved standards and train people to use it better".

In regards to the *KONE CRM end-user survey*, which all participants filled in preparation for the focus group discussion, one participant stated the following:

"I am not really sure who to contact in case of questions on KONE CRM. When you join the company, you are often trained by one of your colleagues and this can result into learning bad habits or wrong practices from them. More consistency in KONE CRM training and better communication around it should be of outmost priority for KONE".

6.3   Findings

Sections 6.1 and 6.2 record in detail the main outcomes of the interview and the focus group phases. This section aims at summarizing the key elements of each round and highlighting their respective outcomes as follows:

- *Phase one (interview round)* included one-to-one telephone interviews conducted between January and February 2014 following a pre-defined and semi-structured qualitative interview protocol. The interviewees sample involved 10 sales representatives and sales managers from various KONE offices around the world;
- *Phase two (focus group round)* was comprised of a face-to-face focus group organized in KONE offices in Chertsey, United Kingdom (UK) on 14th of November 2014. The focus group sample included 5 KONE Sales Executives from KONE UK. The session took approximately 2 hours and followed a pre-defined agenda with a primarily qualitative approach.

In both phases, participants were proposed by their respective area/department Manager/Director based on their fairly good knowledge and track experience in KONE CRM, and in particular, in creating and maintaining opportunities as part of their sales activities. Both rounds included representatives from the different KONE business lines to allow diversity in the results and cover as many areas of concern as possible within the KONE CRM user community. Participants in both phases were requested to complete an online (Webropol-based) KONE CRM end-user survey in preparation for the sessions. From the survey results, *more frequent CRM training and communication around KONE CRM changes; improved KONE CRM training material and; higher commitment from KONE*

management in defining promoting and encouraging a systematic approach to KONE CRM emerged as key concerns within KONE CRM user community.

Phase one was primarily focused on identifying the main challenges/complains around KONE CRM opportunities tab layout and overall opportunity management at KONE *(problem identification and realisation phase)*. Phase two, on the other hand, was mainly concentrated on validating phase one´s emerging themes and collecting additional feedback and development proposals *(validation and knowledge-building phase)*. All input gathered throughout the two phases is used as basis to draft a set of recommendations and development proposals to drive future improvements and development of KONE CRM.

During phase one, participants were asked to identify their main challenge/complain about KONE CRM opportunities tab layout and overall opportunity management at KONE. Topics like *Time consuming, Unnecessary/too many compulsory fields, Lack of synchronization with other KONE systems, Too much data required for lost opportunities, Inaccurate stages of probability and General KONE CRM feedback (e.g. duplicate data, limited search functionality, etc.)* were mentioned as areas of concern. Further enquire during this round allowed some specific improvement areas and development proposals to be identified as follows:

- *Make win/lost information mandatory*
- *Add field description/additional details*
- *Add Previous Contract # field*
- *Re-define stages of probability*
- *Allow having main customer and subsidiaries under it*
- *Enable several accounts being added/linked to the same opportunity*
- *Enable new opportunities being automatically populated out of existing data*
- *Built estimate sheet into Salesforce to allow quotation being done in CRM and its data being pull to automatically populate the opportunity*
- *Develop interfaces between CRM and other KONE systems (e.g. SAP)*
- *Define roles in CRM and set-up views based on assigned role or business line*
- *General KONE CRM Proposals (i.e. investment on tables for salespeople; improved reporting capabilities and; improved KONE CRM speed)*

Section 6.1 includes detailed information on each of the above-mentioned items. As per the overall results of phase one, the main proposals for simplification/further enhancements on the opportunities tab layout and overall opportunity management in KONE CRM are those related to *adding field description/additional details* to the tab *(mentioned 2 times)*, *re-defining the stages of probability field (mentioned 2 times)* and to *developing interfaces between CRM and other KONE systems* like SAP *(mentioned 2 times)*. All other proposals were mentioned just once by interviewees.

Here it is important to note that, during this phase, a few challenges were observed by the author: firstly, the lack of face-to-face interaction during this round made face-to-face a priority for phase two; secondly, some language barriers/limitations were experienced during this round as not all interviewees were native English speakers; finally, not having face-to-face interviews prevented the author from benefiting from non-verbal communication *(e.g. facial expressions, body language, intonation and other non-verbal signs)* for further analysis. Therefore, phase two was an attempt to address and overcome all the above-mentioned challenges. During phase two, for instance, only English native speakers took part and the focus group discussion was organized face-to-face in KONE offices in Chertsey, UK.

During phase two, participants were introduced with the key emerging themes from phase one, asked to assess their validity and to select the 3 most important and beneficial for them. From those 3, each participant was requested to rate them in a scale of *1 (Low) to 3 (High)* to identify the most important themes. From this exercise, participants selected *6 - Enable several accounts being added/linked to the same opportunity (given a total of 10 points)* and *9 - Develop interfaces between CRM and other KONE systems (given a total of 10 points)* as the ones requiring most attention and seen as highly beneficial. Other proposals like *7 - Enable new opportunities being automatically populated out of existing data*, *8 - Built estimate sheet into Salesforce* and *10 - Define roles in CRM and set-up views* were also flagged as important but only gathered 3 favourable points each. This exercise was an effort to validate the results of the first interview round and draw the basis to formulate a set of recommendations and potential development plan that is further discussed in the conclusions chapter (chapter 8).

Furthermore, during phase two participants were also asked to list additional simplifications/further enhancements that they would like to see implemented in the opportunities tab or in KONE´s overall opportunity management. For this, the moderator resourced to the *Affinity Diagram* methodology to further collect and group proposals in big themes or so-called *Affinity Diagram Headers*. Below the 4 emerging headers and their correspondent proposals are listed. More detailed information on each of the following items can be found in section 6.2:

a. Simplified / Enhanced Fields

- Top 10 customers display by business line
- Enhanced clone opportunity option
- Enhanced *Next Step* field
- Win/Loss link comments
- News flash of orders received
- Populate *Opportunity Name* also in the address box
- Product field (equipment)
- Colour code the screen to link with roles
- Only managing fields specific to job role

b. Interfaces across KONE systems & CRM

- Use *Equipment* # to populate customer information already in SAP
- Win submit button to SEB
- Ability to add/edit whole estimate sheets and hold documents, spread sheets and photos on CRM
- Link C4L reports so other business lines can use it
- C4L request button
- CRM used as single point of access to all KONE database
- Link lift information from SAP

c. Adequate / Correct Tools

- Button to send contact details of customer to phone, etc.
- Interface KONE mobiles with CRM
- Phones and tablets

d. Sales Management / Strategy Improvements

- CRM linked to Google Maps to enable graphic overview of current, lost and prospective customers
- CRM market research

In the following chapter, the development proposals emerged during phases one and two are further discussed based on their value contribution to answer the research questions under section 2.2. This next chapter also incorporates in the analysis additional considerations around the research´s business value, validity, reliability and ethics, all elements of great importance to measure whether the set objectives for this project are or not realised.

7 Discussion

7.1 Argumentation on research question

In this section, the research question is answered: *What simplifications and further enhancements are needed into KONE CRM opportunities tab and overall, on KONE opportunities management, to improve users´ experience, foster adoption and increase overall sales efficiency at KONE?*

To answer to this question, each related support sub-question is addressed utilizing both, the results collected in the two data collection phases as well as concepts from KONE and the literature review listed in earlier chapters as follows:

a) What are the main areas of concern raised by end users when creating and maintaining opportunities in KONE CRM?

During the telephone interview round (phase one), participants were asked to identify their main challenge/complain about KONE CRM opportunities tab layout and overall opportunity management at KONE. In this round, interviewees acknowledged the following as the main areas of concern (detailed information on each item can be found on section 6.1):

- *Time consuming* (mentioned 5 times)
- *Unnecessary/too many compulsory fields* (mentioned 5 times)
- *Lack of synchronization with other KONE systems* (mentioned 2 times)
- *Too much data required for lost opportunities* (mentioned 1 time)
- *Inaccurate stages of probability* (mentioned 1 time)
- *General KONE CRM feedback* (i.e. time constraints to enter data in the system; duplicate data; limited search functionality) (mentioned 3 times)

As part of the focus group discussion (phase two), participants validated the earlier collected concern areas, and special emphasis was made around the first 3 items for which further related proposals were made (detailed information on all development proposals

made during phase two can be found on section 6.2). Overall, participants raised their concern about KONE CRM being time consuming due to various fields, many of those compulsory, required when creating an opportunity. Therefore, many of the proposals made during the second round are related to things like enabling users to only manage fields specific to job role or colour coding the screen based on set roles. In addition, users still see potential to improve synchronization of KONE CRM with other KONE systems like SAP. In users´ opinion, better interfaces would allow them having to enter information only once and maintaining it in one single place, reducing the risk of out-of-date or mistaken data and duplicates across platforms and saving them time that could be dedicated to better serve their customers.

In a nutshell, all these proposals that emerged during phase 2 are an antecedent of the need to continue focusing the attention into improving KONE CRM´s *usability* and *user experience* as earlier discussed under chapter 3. The outcome of phase two evidences the importance of continuing developing the system towards even higher standards of so-called *user-friendliness* and enabling a design that is not simply *easy-to-use* but also *easy-to-learn*. It should also be a system that clearly supports strategic goals and facilitates users' work, enabling them to work more efficiently and effectively and inspiring and engaging them. As per the principles of the *User Experience (UX) design*, making this happen could bring tangible benefits to the organization like "increased productivity; increased sales and revenues; decreased training and support costs; reduced development time and costs; reduced maintenance costs and; increased customer satisfaction" (Usability Professionals´ Association, UXPA 2013).

As per support sub-questions *b)* and *c)*, they are answered through table 12 and further related discussion as follows:

b) Which simplifications or further enhancements could be made in the opportunities tab that could positively trigger user experience and foster adoption of KONE CRM? (refer to columns *Simplification/Enhancement Proposal* and *Implementation Status in KONE CRM* in table 12)

c) How feasible are the simplifications and enhancements identified above? Which ones should be treated as priority, which ones could be postponed, and which ones can't be implemented in the current situation and why? (refer to column *Feasibility in KONE CRM* in table 12)

Table 12 presents a summary of users´ development proposals collected throughout the preparation of this study project. There are a total of 31 proposals made by users based on their observations and experience using KONE CRM to manage their sales activities. To analyse their context and evaluate their potential status of implementation and feasibility in KONE CRM, a dedicated meeting to discuss the details took place on 19th of November 2015 with KONE CRM´s Solution Owner. Table 12 summarizes the outcome of this discussion.

To facilitate the analysis, Table 12 is colour coded to differentiate from the 4 emerging levels of priority in terms of feasibility and implementation of these proposals:

Firstly, there are those proposals highlighted in ==yellow== (i.e. 3), considered **priority # 1** in the context of this study. They are all proposals previously identified in other instances of KONE CRM development, like during KONE CRM training sessions or workshops, and even their implementation may not yet being planned or is under further investigation, they are already flagged as relevant and are being considered for potential further releases of KONE CRM.

Secondly, there are those proposals highlighted in ==light blue== (i.e. 7), considered **priority # 2** in the context of this study. These proposals, despite of being relevant, are more difficult to realise compared to those flagged as priority # 1 for various reasons. For instance, some of them may require an official change into KONE Way processes which could be a time and resources intensive effort; besides, there are some that are not currently supported by Salesforce.com platform but could eventually be made possible in the future with a joint effort or a new technology; finally, there are some others that have never been raised outside the scope of this development project and therefore, there is no sufficient evidence that could drive a change of this nature affecting a +5000 users community at this point in time.

Thirdly, there are those proposals highlighted in <mark style="background-color: #00ff00">green</mark> (i.e. 17), considered **priority # 3** in the context of this study. Here we have a group of proposals that have either been fully implemented already in the platform, or partially executed for some cases and scenarios as a result of efforts carried out after this study project was started. For those not fully implemented, additional efforts are ongoing and work has already started. This is the largest category of the 4 and can be seen as a reassurance of KONE Global CRM Team´s commitment to the continuous further development of the tool, which is been done with great support of the KONE CRM user community.

Besides, it is also evidence that KONE´s *CRM strategic framework,* as per Payne´s definition (Payne 2008), is being realised. It shows that KONE is driven to regularly and systematically review its CRM strategy to proactively identify development opportunities to improve users´ experience, drive CRM adoption further up and increase overall sales efficiency in the organization. This is believed would result into improved business results and increased shareholder value. Building and developing strong tools that effectively and efficiently support sales processes and contribute to create value for its customers and the organization itself is part of this commitment.

Finally, there are those proposals highlighted in <mark style="background-color: #ff0000">red</mark> (i.e. 4), considered **out of priority** in the context of this study. These are proposals that cannot be implemented because they go against KONE Way processes or KONE strategy, or because they are hardly feasible within the current technology and therefore, there is no motivation to further explore them at this point in time.

Table 12: Summary of users´ proposals, implementation status and feasibility

Simplification/ Enhancement Proposal	Implementation Status in KONE CRM	Feasibility in KONE CRM
1. Make win/loss information mandatory	Implemented	N/A
2. Add field de-	Implemented	N/A

Simplification/ Enhancement Proposal	Implementation Status in KONE CRM	Feasibility in KONE CRM
scription/ additional details		
3. Previous Contract # field	Implemented	N/A
4. Re-define stages of probability	Not Implemented	Such a change would require the Process Owner to make a formal change request for the relevant KONE WAY process. KONE CRM, as all other corporate tools, exists to support the process and therefore, if you wish to change the tool, a change to the process should be done first. This will require time and resources for planning and execution as well as commitment and support from all parties involved.
5. Allow having main customer and subsidiaries under it	Implemented	N/A
6. Enable several accounts being added/linked to the same opportunity	Implemented	N/A
7. Enable new opportunities being automatically populated out of existing data	Implemented for some cases and scenarios	This need has previously been identified and therefore, further developments for other cases and scenarios are currently ongoing.
8. Built estimate sheet into Salesforce	Not Implemented	This request cannot be implemented at this point in time because it is against KONE WAY processes. KONE has a process defining that this sort of calculations needs to be done in

Simplification/ Enhancement Proposal	Implementation Status in KONE CRM	Feasibility in KONE CRM
		KONE´s Tendering and Ordering Tool (KTOC).
9. Develop interfaces between CRM and other KONE systems	Implemented for some cases and scenarios	This need has previously been identified and therefore, further developments for other cases and scenarios are currently ongoing.
10. Define roles in CRM and set-up views	Not Implemented	Potential implementation not yet planned but need identified and noted
11. Top 10 customers display by business line	Not Implemented	This function is not supported by Salesforce.com platform but the need has been identified and noted
12. Enhanced clone opportunity option	Implemented	N/A
13. Enhanced Next Step field	Implemented	N/A
14. Win/Loss link comments	Not Implemented	Feasible but no identified need outside focus group. This means that such a proposal has only been made within the scope of this project, which is not enough to implement this change in the system at this point in time.
15. News flash of orders received	Not Implemented	Feasible in countries with *open sharing model* but not identified need. *Open sharing model* refers to that in some countries, opportunities are shared across business lines for communication, planning or strategic purposes but this is not the case in all KONE countries. As this proposal has only been made within the scope of this project,

Simplification/ Enhancement Proposal	Implementation Status in KONE CRM	Feasibility in KONE CRM
		it is not enough to implement this change in the system at this point in time.
16. Populate Opportunity Name also in the address box	Not Implemented	This proposal is against the relevant KONE WAY process because the process states what should be in the *address box* and the *opportunity name* is not a part of it. Besides, this proposal has not been identified outside the scope of this project either, for which is not enough to proceed at this point in time.
17. Product field (equipment)	Implemented	N/A
18. Colour code the screen to link with roles	Not implemented	Same scope as item 10 - Not planned but need identified and noted.
19. Only managing fields specific to job role	Not implemented	Same scope as item 10 - Not planned but need identified and noted.
20. Use Equipment # to populate customer information already in SAP	Implemented for some cases and scenarios	This need has previously been identified and therefore, further developments for other cases and scenarios are currently ongoing.
21. Win submit button to SEB	Not Implemented	Feasible but no identified need outside focus group. This means that such a proposal has only been made within the scope of this project, which is not enough to implement this change in the system at this point in time.
22. Ability to add/edit whole	Implemented - Part of standard	N/A

Simplification/ Enhancement Proposal	Implementation Status in KONE CRM	Feasibility in KONE CRM
estimate sheets and hold documents, spread sheets and photos on CRM	platform	
23. Link C4L reports so other business lines can use it	Not Implemented	Feasible but no identified need outside focus group. This means that such a proposal has only been made within the scope of this project, which is not enough to implement this change in the system at this point in time.
24. C4L request button	Under development	Need has previously been identified and therefore, efforts are already under development.
25. CRM used as single point of access to all KONE database	Not Implemented	Not according to KONE´s IT strategy. This strategy defines that CRM is not the single point of access to all KONE databases and there is currently no system acting as single point of access either.
26. Link lift information from SAP	Implemented for some cases and scenarios	Same scope as item 20 - This need has previously been identified and therefore, further developments for other cases and scenarios are currently ongoing.
27. Button to send contact details of customer to phone, etc.	Implemented - Part of standard platform	N/A
28. Interface KONE mobiles with CRM	Implemented - Part of standard platform	N/A

Simplification/ Enhancement Proposal	Implementation Status in KONE CRM	Feasibility in KONE CRM
29. Phones and tablets	Implemented	Dependant on country and user – frontlines own their mobile policy and decisions around that are made locally.
30. CRM linked to Google Maps to enable graphic over-view of current, lost and prospective customers	Not Implemented	Need identified but on hold because investigation ongoing for other technology.
31. CRM market research	Not Implemented	Hardly feasible (there is no such technology today on the standard platform) and no identified need outside the scope of this project.

7.2   Assessment of the business value

As earlier stated, the main objective of this project is to *gather input on the opportunities tab and overall KONE opportunities management as means to improve users' experience, foster adoption, and facilitate overall sales efficiency across KONE CRM users globally.* Identifying potential areas for further development and simplification of the opportunities tab layout and overall opportunity management at KONE are the key drivers of this research project, and also the main justification for KONE Global CRM Team to support it. These potential development areas are of significant importance for the KONE Global CRM team because any changes happening in the tool affect a community of **5000+ users** scattered around KONE offices around the world.

Enhancements to KONE CRM are released twice per year (June and December) and the approach is global, meaning changes affect all users at once without system downtimes. After a new release, the next time users log into the system, the changes are au-

tomatically visible in their screens. One important item to note here is that key users in the different KONE locations play an essential role in the change management process around new releases of KONE CRM. The CRM Solution Owner informs them of the coming changes one month before the upcoming release. This communication to key users normally happens in the monthly key users meetings organized by the CRM Solution Owner. During this period prior to the release, key users test the changes in the testing environment and assess their level of complexity to plan further actions to communicate and cascade to end users. If the changes are minor, key users may simply prepare, for instance, a newsletter announcing the coming changes. Otherwise, they will prepare a training session and related training material detailing the upcoming functionalities and invite their end users to take part.

While assessing the business value of this project, the following 3 are the main benefits observed throughout its development:

Firstly, this study served as a forum for exchange of ideas, consultation and validation among KONE CRM user community on potential future enhancements to the tool and overall opportunity management at KONE. Both the telephone interviews and the face-to-face focus group were efforts to involve KONE CRM user community from the beginning till the end of the project and embrace their opinions, ideas and experiences through a bottom-up approach, where the author served as the bridge between them and KONE CRM management. As mentioned by one of the participants in phase 2, *"It was a good exercise because we've really never had the opportunity to talk this openly about potential improvements in KONE CRM. It's interesting to see how many users share the same frustrations. You are never alone in the CRM world"*.

Secondly, this study was also an opportunity to look back into those areas previously identified by the KONE CRM user community as requiring further attention or improvements, and define whether they remain or not valid and relevant for our customer base today. As mentioned by one of the participants in phase 2, *"once you put the system into pieces, you realise there are lots of ideas that could make users' life so much easier"*. Therefore,

overall this study reveals that *user experience* remains a priority goal for KONE CRM and therefore, KONE should continue striving to enable ways to improve users' experience, foster adoption, and facilitate overall sales efficiency across KONE CRM users globally. This is in line with what one of the participants in phase 2 highlighted as conclusion of the focus group discussion: *"the main thing I´ve taken away today is that collecting information about what needs to be done is really being done in the right way and we are all working towards improving efficiency in our sales processes which should always be a top priority at KONE."*

Finally, another value contribution of this study is that its findings will serve as input to build future versions of the KONE CRM roadmap and upcoming releases of KONE CRM. All relevant proposals have been presented and are being reviewed and their feasibility further analysed by the CRM Solution and/or Platform Owners. As stated by one of the participants in phase 2, *"it´s good that the system is been review by end-users and eventually being improved. It already works but it has potential to work even better so we need to continue working towards that goal"*. However, here it is important to note that the potential implementation of these proposals will be determined by KONE Global CRM team at a later stage outside the scope of this project.

7.3   Validity, reliability and ethics

In terms of validity, a post focus group is conducted as phase two to discuss the main emerging themes from the one-to-one qualitative interviews (phase one), collect some further insights and opinions, and it is an attempt to validate the results collected during the first round. The idea of using various data collection techniques within the study, commonly known as *triangulation*, is to ensure that the data collected is telling us what we think it is telling us. This helps to corroborate the research findings of the study, enhance its quality, and contribute to its validity and reliability (Saunders et al. 2009).

In addition, in terms of reliability, having a focus group discussion seems adequate because the author is committed to involve the KONE CRM user community in all phases of the research from conceptualisation to analysis. By allowing participants to have a more interactive discussion and impact over the results collected, the author hopes to

ensure that any of her potential biases do not influence the final outcome of the project. There are, however, difficult challenges to overcome when conducting focus group interviews. As stated by Korpel (2015), one of the most common ones is how to keep the purpose of the group clear at all times to prevent it from turning into a non-productive session leading to the wrong direction; another common one is how to create an environment that encourage participants to relax and share openly and freely their thoughts and ideas (Korpel 2005).

Furthermore, both the one-to-one qualitative interviews as well as the post focus group discussion concentrate on answering the research question and related sub-questions. Answers are collected without bias or influence, especially considering the outsider party position of the author. The results are considered valid as they represent the opinion of the target under study and help answering the research question and support sub-questions. In addition, it is considered that the methods utilized in this study were followed thoroughly and therefore, similar outcomes will be obtained if those are reproduced. The author personally organized, managed and was directly involved in all phases of the data collection and data analysis throughout the study, and as per the principles of the Human-Computer Interaction (HCI) framework and concepts like usability and user experience, this work is a reflect of users´ opinions, experiences, observations and recommendations around KONE CRM.

Finally, it seems important to mention a few issues in terms of ethics between the author of the study and the interviewees. All interviewees are informed by e-mail about the scope, purpose and methodology of this thesis project and are be invited to participate in the research in a voluntary basis, following a nomination by their respective area/department Manager/Director. Interviewees are made aware that their interviews are audio-recorded to facilitate their transcription, but their identities are kept confidential at all times and the final report does not single out individuals in any form. This in an effort to build trust and confidence between the author and the participants and to allow as much valuable input as possible to be gathered during the two data collection phases thanks to open and constructive discussions and dialogue between the parties.

8 Conclusions

8.1 Recommendations and future research

As stated in chapter 7, there are several development proposals suggested by KONE CRM users that, in their opinion, could further enhance the tool and drive user experience and adoption up. However, not all of them are feasible in the current technology context or simply because they go against the foundations of KONE Way Processes or KONE strategy. Nevertheless, there are some others that have potential to be realised in the short and medium terms, depending on their level of complexity. Therefore, this study suggests KONE to look further into those proposals and define the requirements and resources needed to realise them. Here is important to re-emphasize that potential implementation of these proposals is entirely at discretion of the sponsor company and any discussion around it is left out from this report. Nonetheless, as per users´ input throughout this study, their highest priority remains in enabling them to only manage fields specific to job role or colour coding the screen based on set roles, and on improving synchronization of KONE CRM with other KONE systems like SAP. In addition, this study also suggests focusing the attention on the following areas:

Simplified KONE CRM user interface and improved usability and user experience

The main recommendation of this study is for KONE to exhaust efforts to drive a more simplified KONE CRM user interface and improved usability and user experience throughout the platform. Overall, it is very important to ensure that key fields are always displayed at the top of the screen and made as easy as possible to view and fill out on a smart phone or a tablet as done on a laptop. This is of pivotal importance because there is evidence that salespeople spend less and less time every day in the office in their computers and more out interacting with their customers, so there is little or no time for exhaustive, complex and detailed forms but instead, simplicity and user-friendliness is of top priority. Besides, if the company wishes its sales force to dedicate more time to better serve their customers, it needs to ensure that the right tools and technology are available to empower them to do so efficiently and effectively.

As per the principles of the *Usability and User Experience (UX),* KONE CRM Management should continue driving active user involvement in the further development of the platform and empowering them and engaging them to proactively provide feedback and input to drive decisions around further enhancements of the tool. KONE CRM user community should be at the very heart of the design of the KONE CRM Roadmap and continue contributing and providing input for further releases of KONE CRM where the main focus should always be an enhanced user interface and improved levels of usability and user experience. Furthermore, based on the foundations of usability, the system should not only be easy-to-use but also easy-to-learn for which learnability is an important aspect that should always drive KONE CRM future development.

On this regard, one potential area for further research could be to launch an in-house development project and set up a KONE CRM user community task force, with representatives from various KONE locations around the world, endeavoured to retake the foundations of *Human-Computer Interaction (HCI), User-Centered Design, Human-Centered Software Engineering, Usability and User Experience (UX).* By utilizing these concepts and frameworks, the task force could engage in an evaluation of KONE CRM as a whole and identify existing IT gaps and the requirements to enable a simplified KONE CRM user interface and improved usability and user experience. Such an in-house development project could bring together KONE CRM users from various locations to work together in a set of face-to-face workshops and collaborative prototyping and mock-up exercises to design an improved KONE CRM layout with a high user focus. Alternatively, it could also be used as a forum to study and evaluate the need, feasibility and level of corporate readiness to either transition into the new Salesforce CRM technology known as *Salesforce Lightning* or procuring additional support technology to update Salesforce offered by companies like *Liid Oy.*

For one hand, *Salesforce Lightning* is marketed as the future of CRM and offers a completely new CRM experience and way to sell that promises to accelerate adoption and value for every Salesforce customer and end user (Rosenbaum 2015). More information on *Salesforce Lightning* can be found on Salesforce website. On the other hand, *Liid Oy* is a Helsinki-based company founded in 2014 with the primary goal of making the life of salespeople easier by ensuring that they never have to worry about CRM data entry

again. Their product, an innovative mobile application compatible with Salesforce and Microsoft Dynamics, promises companies 4 main benefits: firstly, to save you a lot of time by automatically logging all your sales activities such as calls and e-mails to your CRM, based on the e-mails and phone numbers in your leads, contacts and accounts; secondly, after a call or a meeting, you can instantly enter your notes by either typing or by using the speech-to-text feature; thirdly, if you have work-related events outside CRM, their application allows you to connect an external calendar like Google Calendar or Microsoft Outlook with it and push all those meetings to your CRM with just one click; finally, it also enables you to access your customer data in real-time so that you have full visibility to every customer interaction in your company (Liid Oy 2014).

This mobile app could potentially be of interest for KONE because, as per the outcome of the *KONE CRM end-user surveys* conducted in preparation for the two data collection phases, users raised their concern about things like not all customer contact information, e-mails and phone calls being systematically entered/synchronized to KONE CRM. Therefore, there is an identified need around this area, possibly addressed partially already, and it may be worth for KONE to explore further this alternative or similar ones. More information on *Liid Oy* and their mobile application is available on their website.

Improved change management and communications practices

As KONE addresses each of its key CRM processes as per Payne´s CRM strategic framework definition *(i.e. strategy development, value creation, multi-channel integration, information management and performance assessment)*, the company needs to assess and evaluate the change management implications of them. As it is expected, for large CRM initiatives like KONE CRM, companies typically have to undergo significant organizational and cultural change to implement it. Therefore, an effective change management programme, concerned with people, systems and organizational change, is a pre-requisite for CRM success (Payne 2008).

In line with the above, another recommendation of this study is for KONE to launch an effort to revisit its CRM framework for change management by applying, for in-

stance, the `Seven S´ framework developed by strategy consulting firm McKinsey & Company as shown in figure 16 (Payne 2008). In the so-called 7-s framework, effective organizational change is driven by *7-Ss*. There are `*Hard Ss´* and `*Soft Ss´*. `*Hard´* refers to something formal, tangible and measurable *(i.e. strategy, structure and systems)*, while `*Soft´* denotes ideas that are informal, and difficult to measure *(e.g. shared values, skills, style and staff)* (Savkin, A. 2015). According to Payne (2008), the value contribution of this framework is that, when companies deepen into the analysis of these 7 elements, they can better understand their CRM context and constrains and "become more effective at CRM change management by carefully managing and orquestrating the relevant component parts of each element" (Payne, A. 2008, 347). Payne (2008) believes that the 7s framework can help organizations to identify the "many dimensions of change management that are involved in changing the organization to process-oriented CRM. […] This framework provides a means of viewing organizations as packages of key skills, or skill gaps. Hence, it can be used as a tool for analysing organizational deficiencies, building on positive skills and identifying new skills needed" (Payne, A. 2008, 348).
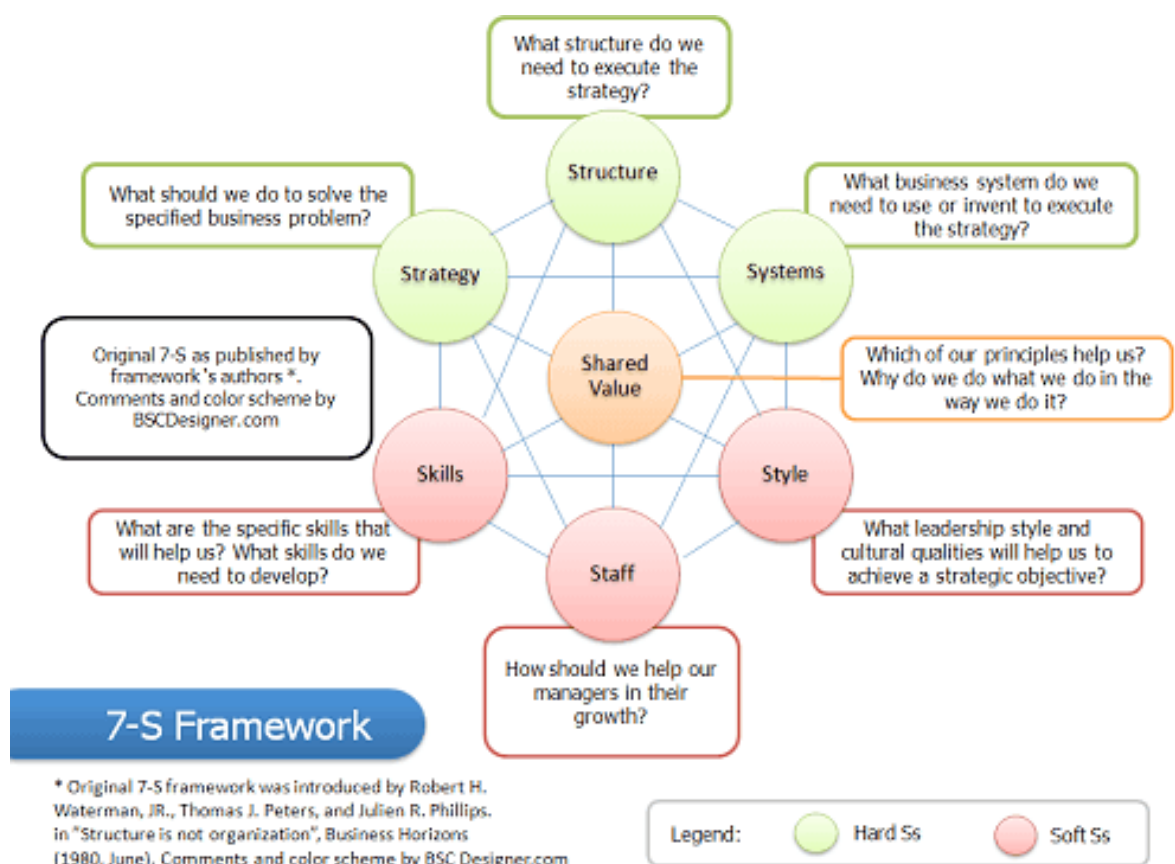
Figure 16. The McKinsey ´Seven S´ framework (Savkin, A. 2015)

The reason for suggesting revisiting KONE´s CRM framework for change management is to re-evaluate whether the actions that have already been taken forward to drive changes are still relevant and effective, and to identify new ways to further innovate in this area. Hence, another potential area for further research suggested by this study is to utilize *McKinsey `Seven S´ framework* and define KONE CRM´s `Seven S´ landscape as input to drive further decisions and strategy around KONE CRM development.

Hand-by-hand with change management efforts, "communication is essential for the KONE CRM strategy and the implementation of CRM within the organization. Without the communication of information to key users -and in turn to end-users- there will be no benefits realisation" (Bondier 2012, 60). According to Bondier (2012), there is already evidence of improved levels of communications around KONE CRM achieved over the past years. Examples of this are, for instance, the monthly key users meetings organized by the CRM Solution Owner to communicate latest features, ongoing issues and open the dialogue with the countries about specific issues or best practices. In addition, *Chatter* tool is also being largely used by KONE CRM users for knowledge sharing and knowledge creation and is a very functional collaboration and social networking tool with deep integration with a number of operational applications.

"Chatter is a collaborative social media tool that allows KONE CRM users to exchange ideas, files, articles and knowledge about KONE products, best practices and projects" (Bondier 2012, 61). Despite e-mailing is the preferred communication method for end users, there is no benefits realisation and no long-term knowledge sharing linked to it for which *Chatter* has great value in building a long-term body of knowledge around CRM development (Bondier 2012). Together with *Chatter*, Salesforce´ *IdeaExchange* forum leverages the power of the user community by allowing a space for communication and exchange of ideas for new product enhancements and to collaborate with colleagues, partners and Salesforce Product Team. More information on *IdeaExchange* can be found in Salesforce website (Salesforce 2015b).

However, there is still more than can be done to realise the full benefits of CRM, specially at the local level, and very good standards of communication are essential to keep people up to the level of knowledge and skills required to achieve that. Hence, this

study also suggests to undergo small efforts, some of them probably already ongoing, at the local level like, for instance, raising awareness of new KONE CRM features in local newsletters, TV screens or notice boards, or use those channels to advertise key dates of coming trainings, releases and any other KONE CRM related activities with the help of key users in the local language. Keeping the end user community up to speed with ongoing development efforts and available instances for engaging in the dialogue (e.g. discussion forums, workshops, etc.), and drive participation and engaging users in those instances, should be at the top of KONE CRM communication strategy.

Improved training and documentation

Training and documentation were, are and will most certainly remain vital for the successful future development and related change management efforts around KONE CRM. The author of this study is not very familiar with the ongoing efforts of the KONE Global CRM Team in this area, not either knowledgeable enough of what is already in place. However, what is known to her is the existence of a CRM training calendar where key CRM dates are kept (e.g. CRM training sessions, upcoming CRM releases, etc.) and an extensive KTOC/CRM end-user documentation library with material ranging from user instructions and quick CRM user guides to detailed training modules (Bondier 2012).

Nevertheless, as an outcome of the 2 *KONE CRM end-user surveys* launched prior and in preparation for each of the data collection phases, participants provided a lot of insight and feedback on what is still lacking in their view around this area:

Firstly, during phase one, a participant raised his concern about CRM training being very seldom and lacking to link CRM with your job and role in the organization, and helping you realise how you can really utilize it in your role to pull forward sales results. Secondly, another mentioned that, apparently, there is not an ongoing training programme where people can sign up, and people seem to be trained to know and refresh the basics instead of trained to improve further or to use the tool to explore sales potential. Thirdly, another participant believes there is a need for a change in mindset around KONE CRM and for this, higher management involvement is vital. According to this

interviewee, the reason why certain information that should is not recorded in CRM (e.g. telephone calls) is because people are not really encouraged by their management to fill that in or are not explained why certain information is needed or what is used for. In his opinion, if people don't see who would benefit from having certain information on CRM, and instead would add to a salesperson's workload, they won't do it. Management should play a more proactive role in making salespeople understand that CRM is a tool to empower them in the sales process not just a tool for the management to extract reports.

Fourthly, a participant raised his concern around knowledge gaps between key users. For instance, this user made the example of the monthly CRM key users meetings where the CRM Solution Owner shares monthly updates. In this participants´ opinion, sessions are very informative but he sees with concern that all key users are not up to the level to understand and follow the discussions and hence, the cascading of information to end users may poorly or not happen at all. Finally, one participant in phase two mentioned to be uncertain about whom to contact in case of questions on KONE CRM. He sees with concern that when a newcomer joins the company, this person is often trained by a colleague, who may not be sufficiently trained or experienced in KONE CRM, this resulting into learning bad habits or wrong practices from them. This user requests for more consistency in KONE CRM training and better communication around it.

The above-mentioned comments are evidence that there is still work to be done in bringing CRM training and training documentation to higher standards, and to ensure consistency in CRM training. There is a clear need to improve communication around coming training sessions and about who to contact for help and advise. This requires raising awareness of these concerns to the key user community, who are the ones driving local efforts. KONE Global CRM Team should encourage local management to make proper time allocations for designated key users to carry on their key user responsibilities (e.g. preparing communication material around new features or planning and executing end-user training). If key users´ time is poorly allocated locally, cascading efforts are likely to fail. Besides, knowledge gaps among key user community should be addressed through regular (and potentially compulsory) key user (refresh and sales max-

imization through CRM) trainings, and key users should also be encouraged and requested to provide regular training to end users with a focus on understanding the link between the tool and people´s role in the organization. There is a clear need for helping sales force understanding the link between CRM and KONE´s strategy and the gaps between global and local requirements.

Moreover, a dedicated Management-focus training module should also be designed to train management into developing the skill sets needed to effectively drive change and motivate and engage people around KONE CRM development. Management should be trained to understand what requires a successful CRM development, the link to KONE´s strategy and the importance of properly allocating time and resources to support coming changes and lead by the example. Finally, it is also important to put a higher focus in localizing training material and systematically follow-up local progress and initiatives at the global level to ensure standards are kept high. This is specially important in those locations where the level of command of English is not sufficient so developing documentation and training modules in the local language (otherwise available in English) is a requisite for success. Key users cannot be left alone to define the level of training initiatives required locally but KONE Global CRM Team should continue guiding and overseeing these initiatives to certain extent and keeping record of what is happening locally. The team should also continue promoting and driving active key user communication and cascading to end users.

Systematically and proactively share best practices and reward good behaviour

As stated by Kevin Filcik (2014), "sharing best practices has long been critical to continuous improvement. The idea is you identify the best way of doing something – either in your industry or within a pocket of your company – and you roll it out across your company to bring everyone up to the highest level of performance. That's what happens in theory at least! In practice, though, it can be incredibly difficult to not only identify those best practices but also to share them across departmental silos and this gets even more difficult in larger companies". KONE should continue maximizing efforts to share best practices among the KONE CRM user community, and to create instances to enable open and honest dialogue around areas of development of KONE CRM. Chat-

ter, for instance, is an example of a tool where best practices can be systematically shared and recorded. In addition, further efforts should be made in instances like key users trainings, communication meeting and annual CRM gatherings (e.g. workshops) to encourage the KONE CRM user community to share and discuss best practices and communicate these ones widely.

Sales people may not always have sufficient understanding on why and how valuable is every piece of data in KONE CRM. Sharing widely and systematically best practices may increase their understanding on why things are being done the way they are and what is their link to corporate strategy. There is no doubt that management plays a pivotal role in promoting CRM as a strategic ally to drive sales activities. In this regard, there are small practices that could potentially drive user´s engagement and adoption up and are related to rewarding good behaviour. For instance, KONE CRM Global Team could reward the user making the best proposal to enhance the platform on a bi-annual basis and announce the winner once the proposal is released to all users globally in the June or December releases. This can create a sense users´ excitement about contributing to bring the tool into even higher standards of performance and usability and also drive adoption up.

Additionally, KONE CRM Global Team could select annually the *KONE CRM Key User Champion* to recognize key users´ efforts in the platform development and communication cascading to the end user community. As many of those key users take this responsibility on top of their KONE role, this could be seen as a token of appreciation for the work of these people to support the KONE CRM Team´s activities. With the help of KONE´ communication department, the story could be shared in KONE´s intranet, detailing the reasons leading to the nomination and the key user´s main achievements throughout the year as example to follow by others, and a short note on this respect added in KONE´s December newsletter. Also, if any large-scale annual KONE CRM gatherings are organized, this Champion could be invited to participate as a guest speaker to share his experiences and insights with other users. As experience has revealed, there is no better way to motivate and engage people than making them feel appreciated and valued, and helping them realising that they are part of something big and important. With the help of the KONE Global or Local HR Departments, rewards could

be made in the form of participation to trainings outside the user´s location that could benefit her/his career development as part of their personal training plans, and improve their learning curve (e.g. participation to conferences or seminars, language training or trainings leading to certification).

8.2   Limitations

This section summarizes the main limitations observed throughout the completion of this study project. These limitations are divided in two categories: 1) those directly observed during the two data collection phases and the data analysis and; 2) those directly related to the author of this study project.

In what concerns to category one, there were three main limitations observed during the telephone interviews round (phase one). These are discussed in more details under section 6.1. Firstly, different levels of English language were observed among interviewees as not all were native speakers nor had the same level of command of English. In those cases were language constrains appeared, the discussions were more challenging, more time had to be allocated for the interviews to be completed and their transcription for the final report was also more difficult to finalize; secondly, phase one revealed the difficulty of interviewees to concentrate on the opportunities tab rather than thinking on the whole KONE CRM. In various cases interviewees found it very difficult to identify elements for simplification or proposals to improve the user experience within the opportunities tab and often fall into the tendency of speaking of issues affecting KONE CRM as a whole. This issue reappeared during phase 2 at a lower extent. Finally, the lack of face-to-face interaction during phase one prevented the author from benefiting of interviewees´ non-verbal communication (e.g. facial expressions) that could have otherwise been included into the analysis. These three key challenges identified during phase one were, however, addressed in phase two by organizing a face-to-face focus group discussion in KONE offices in Chertsey, UK, where the author of this study acted as moderator and where all participants were English native speakers.

As for those limitations directly related to the author of this study project, there were two main constrains to be noted here:

Firstly, the author of this study project needed to extend the timelines of the project much longer than originally planned due to personal reasons. By the time the author officially kicked-off this project back in Q3/2013, she had just started a new job at the sponsor company and within a period of less than two years, she needed to change location 4 times (Belgium, Finland, United Kingdom and Russia) for personal reasons, which resulted in time and availability constrains to complete the thesis within the originally planned schedule. This may have affected the development of this project in a way that, for instance, some of those development areas or proposals made by users in 2014 during phases one and two, may already be in the pipeline for future releases of KONE CRM or even implemented (or discarded) already in the tool by the time they are shared with the KONE Global CRM team.

Secondly, as the author of this study project has never worked in the KONE CRM Global Team nor has ever been a user of KONE CRM, her knowledge of the system itself and its functionalities is limited. For instance, after collecting all users´ proposals (30+ in total), the author is not able to analyse those on her own. As she is not familiar herself with the current state of play of KONE CRM and any potential improvements planned, in the pipeline or already implemented in the tool, she requires a significant amount of time, support and guidance from the KONE Global CRM Team and in particular, from her KONE thesis supervisor, to develop the last chapters of this report.

In conclusion, this study is a reassurance that KONE´s strategy remains driven to deliver performance to customers by creating the best user experience with innovative solutions and striving to expand the understanding of its customers' needs to achieve its strategic targets. It is also a confirmation that KONE CRM is and will likely continue to be a powerful instrument to coach sales people for better results, improve sales efficiency, and promote improved practices allowing more time to better serve customers. There is already evidence of the power of KONE CRM to drive corporate strategy and decision-making, but there are also well-identified areas that need further attention to bring the platform into even higher standards. An enhanced user interface with a clear user focus and overall corporate commitment to drive changes are pre-requisites and should be the foundations of future strategy around KONE CRM development.

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Appendices

Appendix 1. Acronyms

Acronym	Definition
C4L	KONE Care for Life
CPM	Corporate Performance Management
CRM	Customer Relationship Management
GD	Global Development
GED	Global Employee Database
HCI	Human-Computer Interaction
HCSE	Human-Centered Software Engineering
IBMA	Degree programme in International Business Management (MBA)
KTOC	KONE Tendering & Ordering Configuration
KPI	Key Performance Indicator
NEB	New Equipment Business
PDM	Product Data Management
SaaS	Software as a service
SAP ERP	Integrated enterprise resource planning system including logistics and finance management
SE	Software Engineering
SEB	Service Business
TRB	Tendered Repair Business
UCD	User-Centered Design
UCSD	User-Centered System Design
UX (UXD)	User Experience (Design)

Appendix 2. KONE CRM end-user survey results (First Round)

1. Your name

Number of respondents: 11

(Names of interviewees removed from this report for confidentiality reasons)

2. Your country

Number of respondents: 11

- United Kingdom (4)
- Italy
- Russia (2) – *Only one took part in the interview round*
- Canada
- Denmark
- Turkey
- Singapore

3. Your main business line

Number of respondents: 11
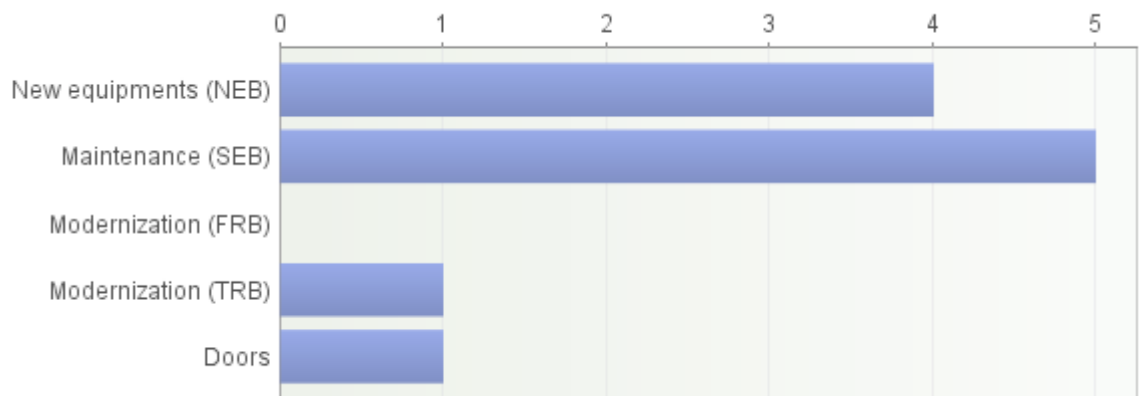
4. What is your average weekly login time?

Number of respondents: 11
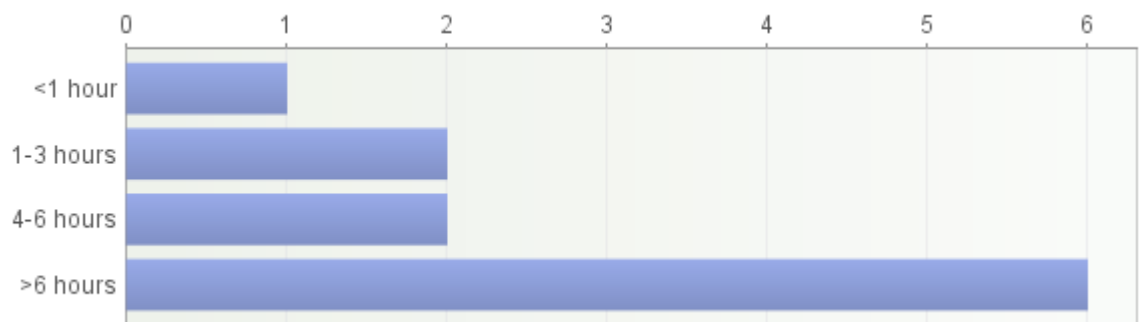
5. Please rate the following statements concerning KONE CRM

Number of respondents: 11

	Strongly dissagree	Somewhat dissagree	Somewhat agree	Strongly agree	Total	Average
You know which customer data you are expected to enter in KONE CRM	0	0	5	6	11	3.55
You systematically create accounts in KONE CRM for your prospects and customers' projects	0	1	7	3	11	3.18
You enter/synchronize all customer contact information to KONE CRM	0	2	5	4	11	3.18
You enter/synchronize all customer e-mails to KONE CRM	3	3	4	1	11	2.27
You enter/synchronize all customer meetings to KONE CRM	0	1	4	6	11	3.45
You report all customer phone calls to KONE CRM	2	4	4	1	11	2.36
You use KONE CRM reports and dashboards to review your sales activities with your Manager	0	0	2	9	11	3.82
You know who to contact in case of issues/questions regarding KONE CRM	0	1	2	8	11	3.64
Total	5	12	33	38	88	3.18

6. Have you received sufficient training regarding KONE sales processes?

Number of respondents: 11
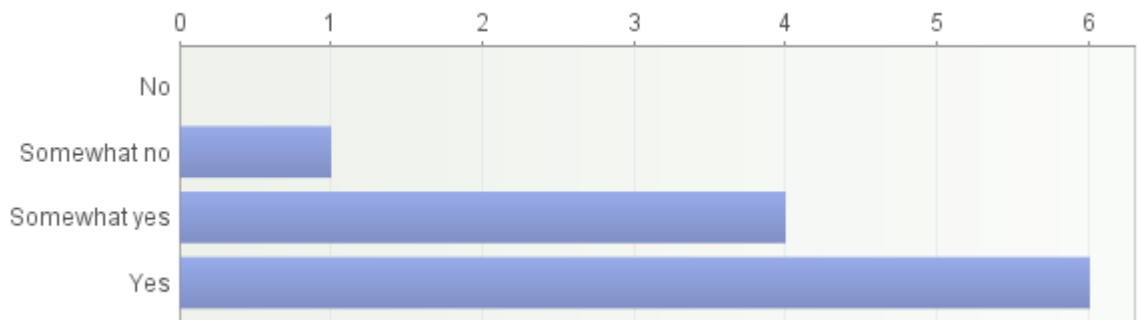
7. How useful is KONE CRM for your daily sales work?

Number of respondents: 11
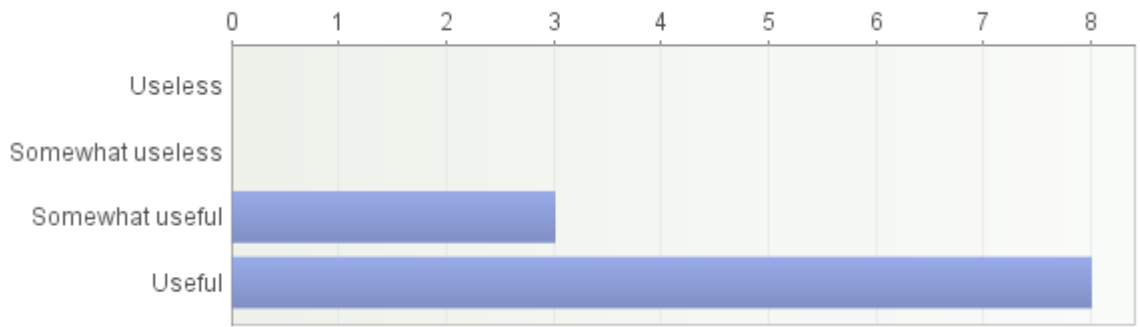
8. How easy or hard is it to use KONE CRM?
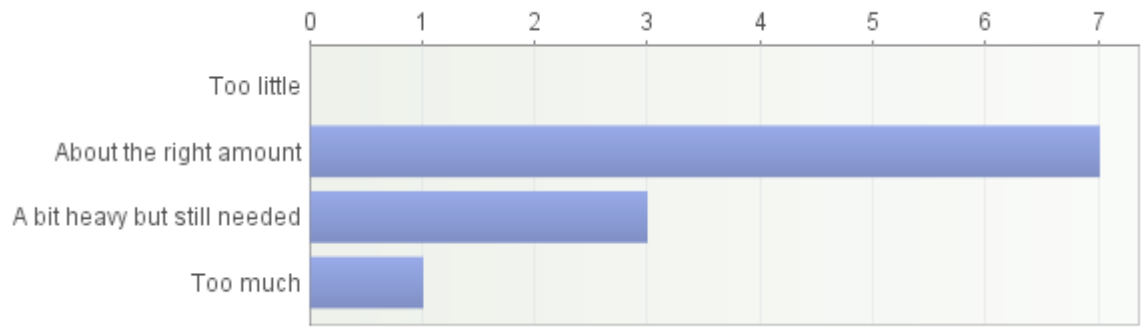
Number of respondents: 11
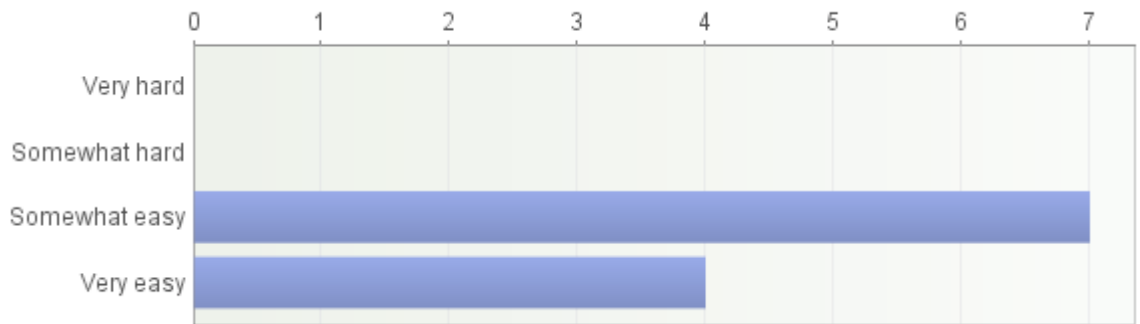
9. How do you like to receive news and instructions about KONE CRM?
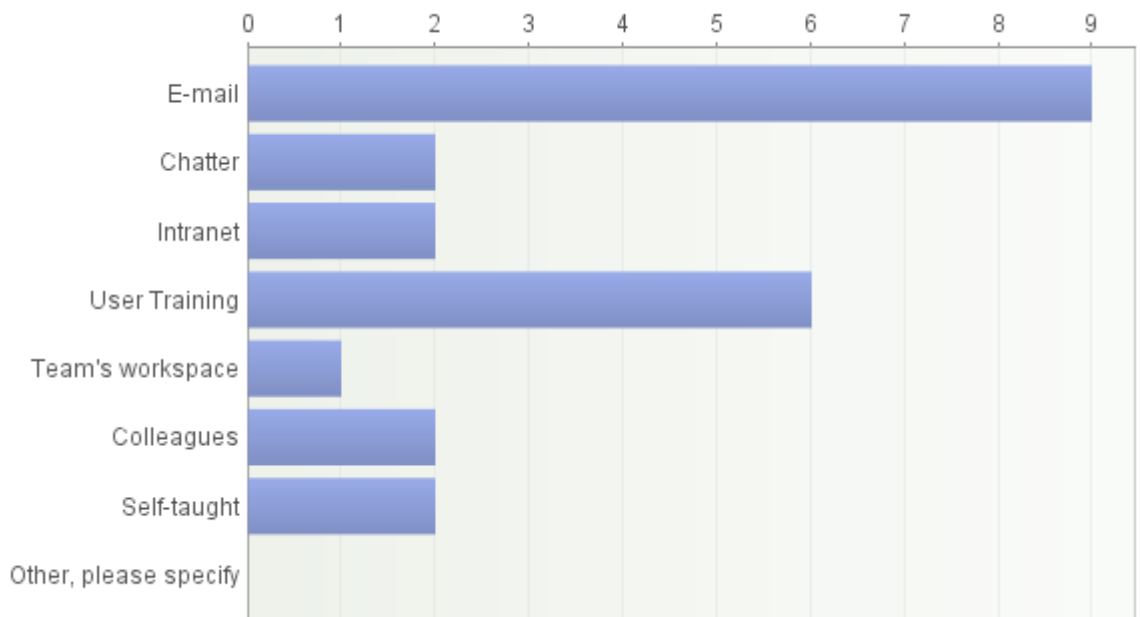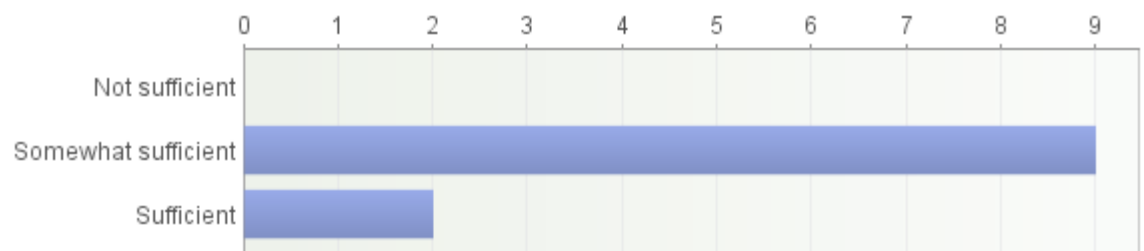
Number of respondents: 11

10. The amount of customer data that needs to be entered into the system is
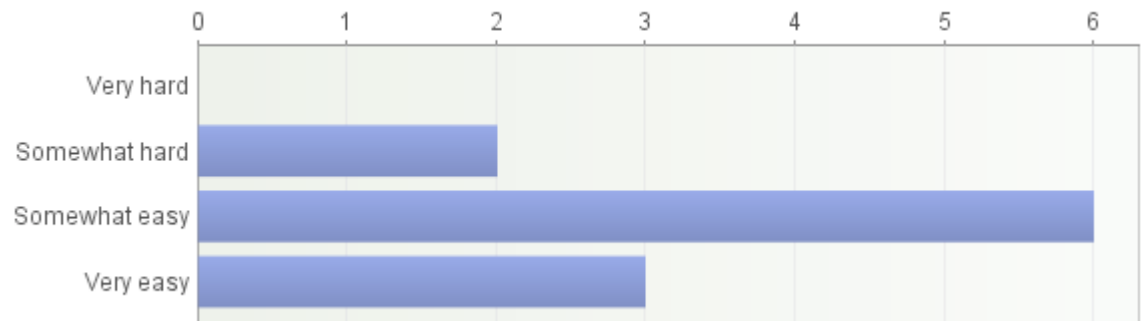
Number of respondents: 11

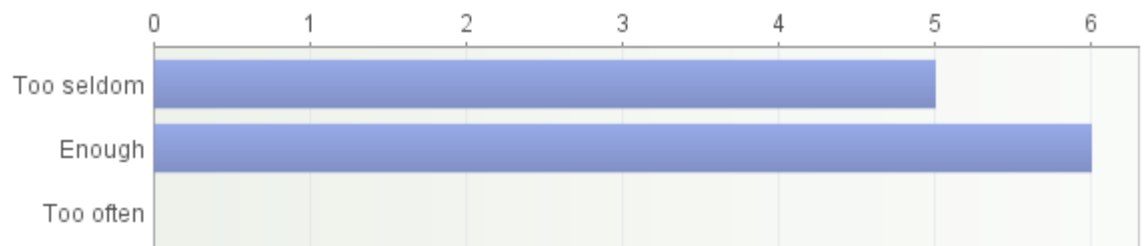**11. The communication about new features is**

Number of respondents: 11

12. Monitoring activities and sales in KONE CRM is

Number of respondents: 11

13. The frequency of KONE CRM training is
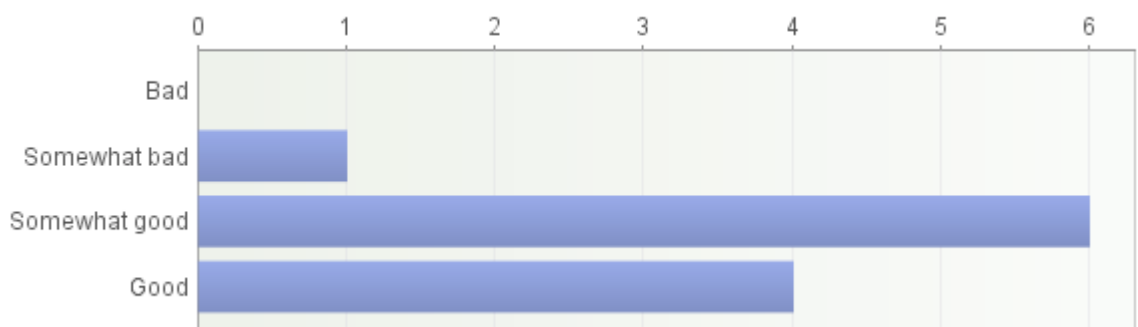
Number of respondents: 11

14. The quality of KONE CRM instructions and documentation is
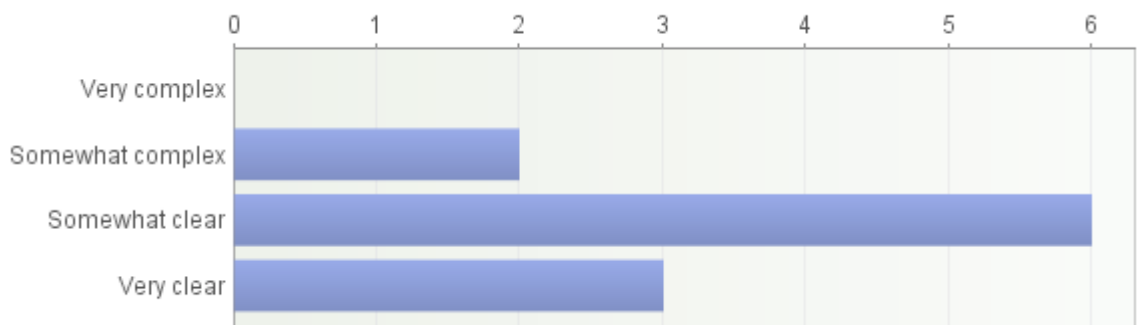
Number of respondents: 11
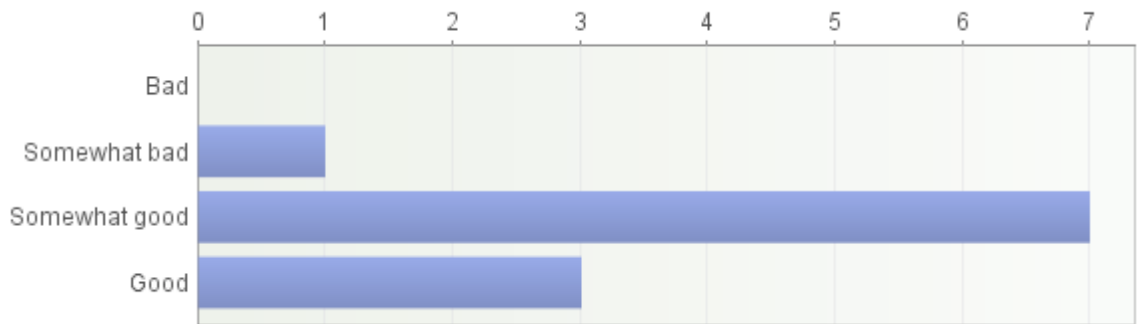
15. The quality of KONE CRM instructions and documentation is
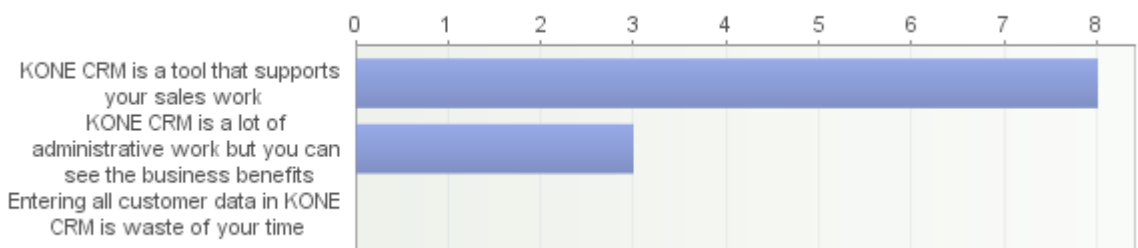
Number of respondents: 11

16. The sales processes are

Number of respondents: 11

17. Finally, choose the statement that represents best your opinion of KONE CRM

Number of respondents: 11

Appendix 3. Qualitative interview protocol (First Round)

This interview protocol follows the Appreciative Inquiry interview protocol style.

STEP 1: Interviewer to introduce the discussion

Introduce yourself/Thanks: Hello, my name is Diana Parada. I am a MBA Student at Haaga-Helia University of Applied Sciences in Helsinki, Finland. I would like to start by thanking you for your willingness to participate and be interviewed here today.

Briefly explain the aim of the project: As earlier anticipated, I am currently preparing my MBA thesis project for KONE Global CRM team in Espoo, Finland supervised by Caroline Bondier, KONE CRM Solution Owner. My thesis' main objective is to enquire about potential elements for simplification of KONE CRM opportunities tab, which is often considered to be one of the most time-consuming areas to be filled in and to have either useless or redundant information. These redundancies sometimes create unnecessary administrative burden for sales representatives, make it difficult for them to maintain and extract current and accurate data to manage the sales process and prevent them from dedicating more time to customers.

Briefly describe the aim of the interview: In this phase, I will be interviewing 10 KONE employees with experience in creating and maintaining opportunities in KONE CRM. Each interview will take no more than 30 minutes and the idea is to gather insights and collect feedback from interviewees on potential elements for simplification of the opportunities tab. Through these potential further developments, KONE Global CRM team intends to continue improving users' experience and facilitating higher levels of adoption and sales efficiency across KONE CRM users globally.

Interview ethics (recording and confidentiality): Before moving into the interview questionnaire, I would like to acknowledge that we received authorization to carry out this round of interviews and any gathered data (including the identity of the interviewees) will be handled confidentially. I would also like to note that today's interview will be recorded but its records will be destroyed once the interview' transcript is produced.

Being this said, would you agree to continue with this interview? (*If the answer is yes, move on to step 2 (if the answer is not, please interrupt the interview and take note of the reasons, if given, for not consensus on participating in the interview).*

STEP 2: Interviewer to follow questionnaire below

Interviewer: Before we move with the questionnaire, would you like to say a few words about your role at KONE and what specifically are you using KONE CRM for? Let´s move on with some questions that will enable us to gather your insights and feedback on creating and maintaining opportunities in KONE CRM:

- What is your main challenge/complain when it comes to KONE CRM opportunities tab layout?
- If you would have the power to change the opportunities tab layout what would you do and why? Please mention at least 2 aspects and justify your answer.
- How would you prioritize those changes and why?
- Optional question (in case there is still time): There is currently an idea to develop a type of sales workflow within KONE CRM that guides you throughout the steps to complete KONE's sales process. The workflow would prompt you to complete tasks once certain parameters/pre-requisites are met and remind you of relevant deadlines or follow-up needed to be carried out in a timely matter. Right now there is no such guidance in KONE CRM and implementing this idea is believed it could bring major business benefits for KONE CRM users globally. What do think of this idea and why? What benefits could it bring for you/your team in your daily work?

STEP 3: Interviewer to close session

Interviewer: This is all for now. Once again, I would like to thank you for participating in this interview and for your valuable contributions. I will contact all interviewees once interviews are transcribed and analysed to share the outcome and provide an update on the thesis progress and next steps. Have a nice day!

Appendix 4. Transcripts of qualitative interviews (First Round)

The following is a simplified version of the transcripts from the 10 telephone interviews (30 minutes each, qualitative approach) conducted between January and February 2014:

Interviewee 1 (Service Business Development Manager, UK)

Interview conducted on 28/01/2014 between 10:00 - 10:30 CET

Interviewer: *What is your main challenge/complain when it comes to KONE CRM opportunities tab layout?*

Interviewee: In current role not any difficulties in working with CRM. Personally and with the level of knowledge in the tool, don't have any issues working with the tool. But from salesmen point of view, the amount of detail is time-consuming, especially when having to start from scratch creating the account and the contact.

From sales people point of view, setting up the account appears to be the most frustrating task. Haven't heard many complain about working with the opportunities tab.

Interviewer: *If you would have the power to change the opportunities tab layout what would you do and why? Please mention at least 2 aspects and justify your answer.*

Interviewee: From my personal point of view and in my current role, something I would like to see done is that the win/lost information would get mandatory around who we've lost it to and some more details about the pricing because right now is pretty easy to simply put lost and that's it basically. Make it a bit more demanding for sales-people to provide more information about what has happened, that would be useful. Maybe important a field for additional comments under win/lost section and you will need to make it mandatory so people do not ignore it.

Interviewer: *How would you prioritize those changes and why?*

Interviewee: Top priority would be to rethink the win/lost section and make fields there mandatory to push salespeople to gather and record more information, especially when an opportunity is lost.

Interviewer: *Optional question (in case there is still time): There is currently an idea to develop a type of sales workflow within KONE CRM that guides you throughout the steps to complete KONE's sales process. The workflow would prompt you to complete tasks once certain parameters/pre-requisites are met and remind you of relevant deadlines or follow-up needed to be carried out in a timely matter. Right now there is no such guidance in KONE CRM and implementing this idea is believed it could bring major business benefits for KONE CRM users globally. What do think of this idea and why? What benefits could it bring for you/your team in your daily work?*

Interviewee: From a manager perspective, I can certainly see the benefit of that sort of process. But the sales people may consider that to be very descriptive, micromanagement, almost being pushed along to do things rather than being given the ability to decide when they do things and so. I can see both sides of the fence and benefits on both sides. Some people would appreciate it but some others absolutely hate it so I see it quite difficult to implement it with quite full success. It's a matter of individual preferences.

Interviewee's additional comments related to online survey (filled in prior to interview): Some training for the sales managers is required, there is not really any ongoing training program where people can sign up. People are not trained to improve further or to use the tool to explore potential. In the UK for example, we have a super user and when a new person joins the team, he/she is given a one-day training session and then sales managers give additional training along with the job but the problem is that their knowledge is not always so great. So the end result is that people do not progress, but rather stay at the basic level in the usage of the tool. Plus you usually learn the (bad) practices from other colleagues or learn by yourself from spending hours going into the tool and trying out things. I would expect that a training program conducted by the KONE CRM global team would be established where people could sign up and regularly improve their skills and further explore potential in the tool.

Interviewee 2 (New Equipment Sales Executive, UK)

Interview conducted on 28/01/2014 between 16:30 - 17:00 CET

Interviewer: *What is your main challenge/complain when it comes to KONE CRM opportunities tab layout?*

Interviewee: Being honest, I don't think there is anything there that it shouldn't be there, there may be a couple of boxes but as far as for the main layout of the opportunities tab, the opportunity information, the description information, the file information, the win/loss information, project information is probably the least used section of it, but is not compulsory so if you don't need it you can just bypass it so I don't see really anything that shouldn't be there or that would be wasting too much time.

Interviewer: *If you would have the power to change the opportunities tab layout what would you do and why? Please mention at least 2 aspects and justify your answer.*

Interviewee: Everything there is pretty relevant, I am quite believer of keeping things simple.

Interviewer: *How would you prioritize those changes and why?*

Interviewee: Skipped as interviewee is pretty happy with the current set up of the tab and didn't have any proposals for changes there that could be prioritized

Interviewer: *Optional question (in case there is still time): There is currently an idea to develop a type of sales workflow within KONE CRM that guides you throughout the steps to complete KONE's sales process. The workflow would prompt you to complete tasks once certain parameters/pre-requisites are met and remind you of relevant deadlines or follow-up needed to be carried out in a timely matter. Right now there is no such guidance in KONE CRM and implementing this idea is believed it could bring major business benefits for KONE CRM users globally. What do think of this idea and why? What benefits could it bring for you/your team in your daily work?*

Interviewee: I don't understand what other tasks apart from chasing the opportunity to try to win the job would be linked to an opportunity. Because once I create an opportunity I set up on the opportunity my own task to chase that opportunity on a particular date so on a weekly basis I know if something needs chasing. So from a workflow perspective there is nobody else that deals with my opportunity apart from me. The only other thing that the system should do is that say a lost job for example is to go down to let know sales people we've lost the job we quoted and go after this job for the service contract, but I think we do that anyway. I can only speak for my business line but there is a danger of thinking we are simplifying something when the reality is that we've got a good system that if we use it right can work very well.

But if we are talking about setting up the whole CRM as such, we often get into a situation where we externally contract systems with a similar set up but at certain stage you end up with so many emails telling you that you have these many tasks pending that you delete them and do nothing with them so you have that danger. If we talk about the whole CRM, there are indeed a few tasks there that I find a bit complicated like for example when you create a lead because is not that user-friendly on how you close that lead off, so that part could be simplified.

Interviewee's additional comments related to online survey (filled in prior to interview): In terms of CRM training, I do think is quite seldom but personally with the knowledge I have of the tool things seem to work quite well for me so I don't have major complaints around that. But from a starter point of view, there doesn't seem to be any consistency on how people use CRM because I use it differently than the next person. There is not an onboarding training to teach newcomers what the best practices are that work well and how you should do things religiously. It's a mess from that point of view. Personally I don't think I could get much of additional training but it's basically for the new guys. Training for newcomers is given by an UK key user. An important message to close is that we need to streamline our processes in many different departments not to spend so much time on our laptops but to go out and meet our customers, the simpler we can make things the better. But the tool also needs to be effective enough to allow us to do business with those customers.

Interviewee 3 (Retention Account Manager, UK)

Interview conducted on 29/01/2014 between 16:00 - 16:30 CET

Interviewer: *What is your main challenge/complain when it comes to KONE CRM opportunities tab layout?*

Interviewee: Usually the main issue with KONE CRM is that is time consuming, to be able to save the opportunity you have to fill in a lot of information first. Some of the information there is, in my opinion, not very relevant. So my main concern is the amount of data you have to enter before it actually allows you to save, too many compulsory fields. Otherwise is pretty straight-forward and easy to use.

Interviewer: *If you would have the power to change the opportunities tab layout what would you do and why? Please mention at least 2 aspects and justify your answer.*

Interviewee: I am looking right now at one of the opportunities I was working on this morning and for example under *opportunity information* the *primary campaign source* is something I've never used, so I don't know much about that. Again, *Contract/Tender #* is something I don't use much either. There is also a section called *project information*, which I don't either use but it can also be that is something important for other areas of the business but it does not apply to doors. We are not working on a project basis but more on direct sales on the doors business. In terms of things that could be but are not yet in the opportunities tab, for example, there is a field that says *New Contract #*, however there is not always a (previous) contract number so it would be useful to have if there is an existing contract number. For example, if I would be using an opportunity to renew a contract, it would be helpful to track the opportunity that I was using linked to the old opportunity through the existing contract number. It would be also useful to do so not only through the contract number but also through the value of the old opportunity and the number of units. This would make it easier, together with the basic information of the opportunity, to renew a contract.

Interviewer: *How would you prioritize those changes and why?*

Interviewee: What I would specially like to have is that if I create a new opportunity through the account, it would be possible to link it to any other opportunities that were created previously. Because in that case if you could see the opportunities that are linked to the new opportunity it can basically give you an overview of that particular contract or that customer and again it would be very useful when renewing contracts. Currently I do experience problems when I'm trying to renew contracts because at the moment that I am trying to renew the contract I need to create a new opportunity and I don't see the old opportunity linked or can pull data from there, which would be very useful.

Interviewer: *Optional question (in case there is still time): There is currently an idea to develop a type of sales workflow within KONE CRM that guides you throughout the steps to complete KONE's sales process. The workflow would prompt you to complete tasks once certain parameters/pre-requisites are met and remind you of relevant deadlines or follow-up needed to be carried out in a timely matter. Right now there is no such guidance in KONE CRM and implementing this idea is believed it could bring major business benefits for KONE CRM users globally. What do think of this idea and why? What benefits could it bring for you/your team in your daily work?*

Interviewee: I think it would be very useful to have something like this. At the moment I think I have over 300 opportunities in CRM, with related tasks possibly due on the same date so it would be useful to have a notification, a text or an e-mail to tell me for example that I have 2-3 days to prepare a quote or that an opportunity requires an update or something like that.

Interviewee's additional comments related to online survey (filled in prior to interview): I do believe that CRM is a very powerful tool and very useful. At the moment it works pretty well. Maybe it asks for a bit more information that in my opinion and in my business line is required but overall I see its benefits. When I joined KONE, a colleague (non-key user) showed me briefly how to use CRM and I also attended one of the Salesforce training courses.

Interviewee 4 (Manager District Service Sales, Canada)

Interview conducted on 29/01/2014 between 17:00 - 17:30 CET

Interviewer: *What is your main challenge/complain when it comes to KONE CRM opportunities tab layout?*

Interviewee: Project information for NEB is perfect and relevant. But if you click on VB repairs you probably don't need that information. It depends on the business line. One of the things that bounces from salespeople and I know it frustrates me when I do it as well is that if I'm tracking an opportunity said lost to a competitor to get to actually mark that is lost it takes three steps because it keeps telling you that there is an error because then it shows you there are some fields you haven't filled in properly. And it is good, KONE really wants to know about its competitors (e.g. winning price) but the problem I have with this is that that most of the times you don't know the details, you have no idea who won the order or the sales price, you may know retroactively but by then you'd move on, it's a very dynamic and busy sales workflow that you don't have the time to retroactively go and change what's been lost, you are always working on the net win. So what I end up seeing there and it ruins a couple of the dashboards is that when your competitor is other or unknown, end value is one (1) because you have to put something there to be able to save. So what I see is that a lot of people don't bother about that and they just mark it cancelled. So that's one redundancy in the front line.

Otherwise the opportunity section actually works pretty well. We use the mail merge functionality a lot to create quotation. One thing that would be fantastic relates to estimate sheets. The biggest challenge in CRM is duplicate of information. So let me walk you through how typically a sales process would work. You've met a customer that decided they need a new door. As the sales person I would come back, open up the experience and calculate how many hours I'm going to need, how much is going to cost and what I need to do is to open an estimate sheet that is in Excel and helps me calculate the profits and everything. The estimate sheet is very good. It helps a lot. What I would like to see is that estimate sheet built into Salesforce to turn into an opportunity because all the information that I have put into the estimate sheet has then to be re-entered as an opportunity in Salesforce. And then I create a mail merge out of that opportunity to

the customer and then basically fill in the price, pdf it and send it over to them. If we win that deal, I go back to Salesforce and update the opportunity, that's fine and that's not a problem. But I then need to go to SAP and enter that order. So the result is that for that one deal, I have entered that same information 5 times. So there is a lot of redundancy that needs to be addressed.

And the main challenge is that if Salesforce is the Bible to do anything with sales, will you never have to leave it? Then that's the end of the world for KONE. But when you got spreadsheets and SAP as well is just another thing you have to do. It doesn't have to be that way. I mean you are talking about 3 different systems talking to each other which is extremely technically challenging but the estimate sheet could be built into Salesforce and then that can flow and create the opportunity automatically and then you just have to update certain fields so you never have to leave the screen. The ideal world is that you never want them to move away from the webpage. So for the SAP functionality, one of the ways we've tried to do that is have one dedicated person like a Coordinator in the branch entering those deals into SAP because that helps us to one free up more time from salespeople to go out and look for more deals. Two, SAP is very convoluted, difficult, it doesn't make too much sense for a salesperson. So consistency in correct billing and making it easier for account receivable, having one person knowing how to do that helps. This is something I've mentioned last year to the CRM team but that it will take time and significant resources put into it before it can happen but I know is in their minds as part of the idea of moving Salesforce into the next generation to make it even better for KONE (5 years plan).

Another thing on the opportunities tab is that when you get to the stage of probability, things don't really work very well and here it is why: this is just a personal opinion but if you have a 10% budget price, that's where you need to make good use of salespeople and say you know what, we've made a contact with the customer, this is the bold part, there is a long way to go but I want to start tracking it. RFQ (request for quotation) is something that not many people use around here to be honest. A lot of people don't use that because they just provide the tender quotation and go to *tender/proposal*. We tend to see a lot of stuff at *tender/proposal* stage. Then we get to *negotiation/review* where we see a lot of stuff that would move forward and actually what I will do is to e-mail

you my sales opportunity process that we use here in Western Canada. So what is missing is that we move from *negotiation/review* of 50% to *order agreed* which is 95%, that is a huge job! We don't have a 75% category to indicate that we've got an understanding but we don't have it yet signed. So what we usually do is that we leave the *negotiation/review* but change the probability to 75%. And that helps in the forecasting because if we see a 75%, we know that there are just some legalities or some paper work to be finalized and we start tracking that. And depending on that we know if the close deal date will come this month or not and we forecast based on that. At 50% that's a lot harder. So a 75% stage view would be great. And the reason why we did our sales opportunity process file is because of consistency among our sales people because Western Canada is a massive area with different time zones so I don't talk to the salespeople on a daily basis, is just too difficult. What we've done is that we've built this in a way that every time a new salesperson joins the team this person is given the file and can ask questions. It just means to reason the milestones you want to have delivered so we know the 20% in Winnipeg is the same as the 20% of the salesperson in Victoria. We are looking at achieving consistency.

By the way, I forgot to mention one thing about KTOC in modernization and new construction. That's needed for SEB and it at least replaces an estimate sheet because you build your estimate in KTOC which is then subsequently within Salesforce and it may actually be coming so maybe you can let me know about that. So that's very similar. So that for the service line would be absolutely huge.

Interviewer: *If you would have the power to change the opportunities tab layout what would you do and why? Please mention at least 2 aspects and justify your answer.*

Interviewee: (This question was not addressed as interviewee gave all details under the first question)

Interviewer: *How would you prioritize those changes and why?*

Interviewee: The estimate sheets built into Salesforce and opportunities created automatically out of the estimate sheets' input would be my priority number one. You get

away from using spread sheet using only Salesforce so you get rid of some duplications, save a massive amount of time for salespeople and get them excited about using Salesforce again instead of just having to use it because they have to. That's the biggest impact you could have.

My second priority would be related to the stages. Some clarity on what the stages represent. That word document I sent you, I developed that in Western Canada but that's not a KONE standard protocol and I like to use KONE standard protocols because we are a global company which invests lots of money developing standard procedures and it doesn't help having a small region having its own thing. The problem is that I could never really find explanations on what really goes for each stage so we created this so we could drive consistency. So if there is such a document where it is clear the milestones that need to be achieved at each stage I would like to see that shared and the actual global process that we should be following.

Interviewer: *Optional question (in case there is still time): There is currently an idea to develop a type of sales workflow within KONE CRM that guides you throughout the steps to complete KONE's sales process. The workflow would prompt you to complete tasks once certain parameters/pre-requisites are met and remind you of relevant deadlines or follow-up needed to be carried out in a timely matter. Right now there is no such a guidance in KONE CRM and implementing this idea is believed it could bring major business benefits for KONE CRM users globally. What do think of this idea and why? What benefits could it bring for you/your team in your daily work?*

Interviewee: I think it would bring benefits if it's simplified and streamlined because where we have to be careful at the steering group is the way you get quick and fast seduction by showing the benefits of how it's going to help people in the front line, remember these are very busy people having multiple things to do and having multiple people pulling them into different directions to get things done. When you start to impose things and dictate to people, the natural reaction is to rebel and not to look at it as a value but as something that people who do not understand what we are doing are imposing. You can do it but it just takes longer. I think you should streamline and is not only a process, it can have a benefit and people need to be coached into this being a benefit saying that this is what we want to do because we want to help people with time

management and make salespeople's life easier to drive greater adoption and buying. You really need to show the benefit and I like to help doing that so what we do here in Western Canada is that in our forecast meetings, we show people what is coming and ask their opinion and if they are willing to do it by showing them where we see the benefits so they feel a part of it too. It is important to remember that Salesforce is a small part of salespeople's day, an important but rather a small one, because normally what they spend their day most is in the phone or meeting customers or the management.

Interviewee 5 (Sales Training Development Manager, UK)
Interview conducted on 30/01/2014 between 17:00 - 17:30 CET

Interviewer: *What is your main challenge/complain when it comes to KONE CRM opportunities tab layout?*

Interviewee: For me the biggest issue I've always had is not necessarily been with the opportunities tab but the input method. In my role the biggest challenge I've had is finding the time to input the information. It's a challenge when you don't have the time to enter it right away.

Interviewer: *If you would have the power to change the opportunities tab layout what would you do and why? Please mention at least 2 aspects and justify your answer.*

Interviewee: I was always quite happy with the opportunity's layout. The only issue really, I think, and this is something I've learned since I moved towards the global side of the business, is really that at the salesperson is quite challenging to see things globally. So if I am a salesperson just in the UK, sometimes is difficult really to appreciate why certain fields are there. Take for example *market segment*, *funding sector*, it's something that as a salesperson, you may not necessarily familiar why that is useful so you tend to rather fill it with what comes easier to instead of taking it seriously. This ends up in frustration if you do not really understand why you have to do it. In situations where a salesperson does not know what a field is about, especially if compulsory, there are two options: he/she may ask for a manager or an assistant to explain what it is refers to and get an answer from them or then not bother and put whatever. It depends a lot who

you are learning from. It makes a big difference if you are in front of a key user or just a colleague that can be self-taught and pass on bad habits.

In addition, from my experiences as a salesperson but also as a trainer, one thing that I would like to change would possibly be the stages and to bring them in line with a lot of the sales training that is going in terms of the stages that we have and where the customers are which reflects what we are asking salespeople to do around the world. So what we need is global training to build a global mindset and on how we are asking salespeople to engage with customers and to understand their customer better. With stages I mean *prospecting/design assist, budget price, tender/proposal, negotiation review*, etc… and I think, in the perfect world, and I don't know if it's possible with CRM, in my mind they should be brought into the same language that is used in the sales training we are giving to our salespeople so there is a link between the training and the stages they are at with the customer. For example, when we are asking our salespeople to understand their customers better, ask more questions to get to know them, get to know what their needs are, so often you can be in on a certain stage of customer relationship and with an opportunity and then you don't really know and with something like *tender/proposal, request for quotation,* it doesn't really reflect what stage you are with the customer.

I think it would help adding a description of what each stage is all about or adding a link where additional information about the stage can be found, that would help salespeople. This is important because before I was putting my own opinion about which of these categories of the stages would fit into the stage of the opportunity I was at, but then I found out later on that actually I was not correct and someone else's interpretation was different so adding clarity on this aspect would be beneficial. The same idea could be considered for the *lead source* field in the opportunities tab. There is a lot of information there as for the lead source, but I usually find myself using one or two for the leads that I am getting so an explanation of what each of those covers would be useful. For example, KONE initiates a technician, is that anything from the service guys, and is that from the actual technicians? Because in the UK we have service engineers and then the technicians are maybe a higher level above. We have inspection, is that KONE inspection is that an insurance inspection is that a fire inspection, so really an explanation of what each category refers about and where it falls on would be needed.

Interviewer: *How would you prioritize those changes and why?*

Interviewee: If I'm honest, in terms of diminishing the administrative burden and this is not the only company I've said this at but probably I should get money from tablet makers is that the biggest issue with the tab is not the number of fields but really for me was always when you can input the information and during my later period as a salesperson at KONE I had my own Apple IPhone and I didn't have a work phone that would allow me to get into the internet so I was using my private phone while on the site to fill in CRM, to fill in the details there. And that sort of facility allows the opportunity for a salesperson to input the information while they are actually there, in the meeting, on the site because CRM is very easy system to input as there are a lot of drop down boxes and very much guides you as you know so it's not time consuming, for me the time consuming was always the fact that I had to write the information down and then find the time to switch my computer back on, connect to internet and input the details in CRM. And it's not always very easy to be 100% correct, you need to find the time, it needs to be relevant, and as a salesperson you can do 2-3 meetings in a day and then by the time you come back to put that information into CRM you would rather put the bare minimum rather than put much information as you could. So for me the opportunity to fill in information in CRM any time any place is the key to reduce the administrative burden for sales people. I think there would be so many benefits of providing salespeople with this tool.

Interviewer: *Optional question (in case there is still time): There is currently an idea to develop a type of sales workflow within KONE CRM that guides you throughout the steps to complete KONE's sales process. The workflow would prompt you to complete tasks once certain parameters/pre-requisites are met and remind you of relevant deadlines or follow-up needed to be carried out in a timely matter. Right now there is no such guidance in KONE CRM and implementing this idea is believed it could bring major business benefits for KONE CRM users globally. What do think of this idea and why? What benefits could it bring for you/your team in your daily work?*

Interviewee: I found, and again this is just my position and in the UK, that I wasn't necessarily using all the options that CRM has to offer and in terms of the option that CRM has of setting up tasks and reminders and things like, I couldn't see that being

anything else but useful. I think that based on the training I have received on CRM in KONE and in other companies compared to the information that I've seen since I joined the training side of the business, that there is a lot more training out there on how to use CRM, in how to use it properly. Part of our biggest problem is not being able to use the tool as well as it could be used so anything to encourage people to use it correctly and if they need to be lead to use it correctly then I think that would be useful. It's difficult and I suppose that if you are already a competent user of CRM and you are already using it effectively filling all the information you need and then get notifications may be questioning, you may not be needing them. But for those people that aren't using it like that, what is the best way to get them to use it correctly and part of the way to make them use it correctly is making some of the fields compulsory and the next step is ensuring that they keep filling them in the correct way, that's a difficult one. I think this would as long as you would have the option of opt out from for example notifications or alert e-mails for those users that don't feel they need them.

Interviewee's additional comments related to online survey (filled in prior to interview): Concerning my online survey results, I put that I strongly disagree with the statement on reporting all customer phone calls to CRM. In previous companies I worked for, I did recorded or tried at least to do so for all customer calls, but of course it depended on when you had the time to input the information. And it's a very useful part of CRM to be able to keep a track of what has been say and where you are at with the project but I was never really encouraged in my position to fill that in, so I didn't. Even it would benefit me, at the same time I've had the notes of phone call I've made because I keep a separate book.

So the question was why I would put into CRM, who would benefit from it being there and then I just thought that it would add to my workload so I won't do it. If it's not required or requested by management or by people I'm not going to do it but I definitely think that it is something that should be utilized. I think this is part of the problem that I've found, again not just in KONE but from my own experience in my salesperson role, it goes by to understanding what the system is used for and in my position in the UK I felt for a lot of it that CRM was a tool that's used to produce reports for the management to understand forecasting, to understand the results, but mainly there is a

series of reports by the middle management, senior management, Directors, etc… with information that they need to know about the salespeople and the easiest way to gather that information is in CRM. While for me CRM should be design to aid the salesperson and on the back on that, because the salesperson is encouraged to use CRM, is happy with CRM, can see the benefit to CRM from the personal and from the team point of view, because then they use CRM correctly and on the back of that the management are able to pull in any reports that they want because the information is good and salespeople are really empower to really onboard with CRM. Unfortunately in my experience with CRM, things go the other way around. They would fill things in CRM in order to satisfy what the management are looking to achieve or view if that makes sense.

So if I were in one of my old positions where I was much encouraged to do it, I would definitely fill it in but other companies have the same issue of managers getting hold of the tool and using the report section of it and that's what governs the way you fill in your CRM. I need to ensure for example that I fill in the stages correctly to ensure that when my boss runs his report he can find out how many jobs I have to put on or when they are closing, forecasting and that sort of thing which is useful for the management but in my opinion it should be more a salesperson tool and the benefits that the management and directors and other department within the company get from CRM are above us. We should definitely concentrate on the salespeople and sometimes I feel that companies lose sight of that and CRM becomes much a burden rather than a help.

I also mentioned that in my opinion training on CRM is very seldom. Personally I never received any CRM training, it may have been because I was able to use CRM straight away because of my experience in the past but I think that, and I discuss this with Giuseppe and Caroline, that there are tops on CRM training: how to use it, running reports, the technical part of things and is a very simple system to use I think but it just takes a bit of practice, understanding and a bit of guidance on how to use it well like an e-learning or something where you can have for example step by step guidance on how to create an opportunity and how to do the technical side of things. But really for me the training that is lacking is linking CRM with your job, to understand your business line, to understand CRM and to understand how you can really utilize it for the role you make at KONE for making the best use of it. Of course every business line is different but the problem is that salespeople usually have the technical training but for instance,

they are not thought that hey, as a SEB salesman, this is how we believe you can best utilize CRM and this is how we are going to train you. Really, anybody that is computer literate, they can turn to CRM and by the end of the day, they would have figurate out how to use it, how to fill certain things, what is compulsory, so it's really an easy system to use. I think part of the problem is that people switch off when they get that technical training because is the case of, I'm not an idiot, I can figurate this out. But it goes back to what I mention earlier of understanding why I have to fill in the market segment and what stage relates to what. This is why it is important to fill in this, this is why it makes your life easier, and this is why you run this report or use this dashboard.

Interviewee 6 (NEB Salesman, Denmark)
Interview conducted on 31/01/2014 between 09:00 - 09:30 CET

Interviewer: *What is your main challenge/complain when it comes to KONE CRM opportunities tab layout?*

Interviewee: Some of us find CRM a "pain in the ass" because we spend a lot of time on it but we also can see the good idea behind it. Sometimes we also have problems with customer data because they are duplicated in the system as the customer has different addresses. This happens with large companies having small subsidiaries under them in Denmark, so maybe we should have a better structure in CRM so we have a main customer and then you can split it but we don't have the time and the main power to start this project because we are a little country. We would probably need 1-3 months to do some cleaning.

As for the opportunities tab, I find it very easy and good to use but my main problem in CRM while working in NEB, is that we have sometimes lots of customers under opportunity because they ask us for a price so we can win the project but when I start an opportunity in CRM I don't have the end user or the end customer under project. There are probably 5 different entrepreneurs who ask for the same project. And I can open only one account name on the opportunity so sometimes I need to have 4 account names. I know I can use partners though. When the opportunity of a project has found a winner, is not an issue in the short term but in the future. If a customer has asked

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about this project, I don't have it in account and when I do a search on it, I cannot find it under project, only if he won the project. But if I want to know what kind of project has he asked me about, I cannot make any search on that.

The benefit of being able to find out which projects a customer has asked me before about is that if a customer asks me a lot of times on projects but I never get anything from him, whenever I get to meet him/her I can tell him/her "you have asked me about this and this and this project". But if I don't have him in account name, I can't find him because when the project finds a winner, I will of course put that company under account winner. I have mentioned this lot of times to the CRM team. What we would need to make this working is a bottom that would allow adding extra accounts.

In the opportunity tab you have the main data under project and maybe if you scroll down you could have a field called account 2, 3 and so on. So you can see the full list of customers who asked for a price but didn't win. So what I would like to achieve here is to be able to identify those customers that always come to us for a quotation but never buy anything from us so I can prepare a report and go to them and ask why that is. Maybe is related to limited budget or they are simply using us to complete the number of tender companies they require for their tendering process. So I would need this information in CRM to be able to make such a report. I think CRM is very good when you have the final customer and you only work with one customer but if you work with several customers in the same project, it doesn't work very well. So it would be great if you could have accounts 2, 3, 4, etc… under the same project.

Here in Denmark we are also having lots of breakdowns in CRM and KTOC. We use a lot of time just waiting in the system. We have this almost every day. It happens mainly in KTOC. We don't know really if this is linked to CRM or is KTOC or if it is a problem here in Denmark, but would appreciate to be supported on that.

Interviewer: *If you would have the power to change the opportunities tab layout what would you do and why? Please mention at least 2 aspects and justify your answer.*

Interviewee: (This question was not addressed as interviewee gave all details under the first question)

Interviewer: *How would you prioritize those changes and why?*

Interviewee: (This question was not addressed as interviewee gave all details under the first question)

Interviewer: *Optional question (in case there is still time): There is currently an idea to develop a type of sales workflow within KONE CRM that guides you throughout the steps to complete KONE's sales process. The workflow would prompt you to complete tasks once certain parameters/pre-requisites are met and remind you of relevant deadlines or follow-up needed to be carried out in a timely matter. Right now there is no such guidance in KONE CRM and implementing this idea is believed it could bring major business benefits for KONE CRM users globally. What do think of this idea and why? What benefits could it bring for you/your team in your daily work?*

Interviewee: I think this would work as long as it doesn't take too much time, but overall it could be a good idea. As long as it doesn't become an additional time burden and if it makes our lives easier is ok.

Interviewee's additional comments related to online survey (filled in prior to interview): The frequency of CRM training is very seldom. When I joined the company there was not CRM. Finland was the first country having it. I was the first so-called super user here in Denmark. But I had to hand over the task because I didn't have the time to be so, I am a salesman. A CRM workshop here in Denmark would be a good idea.

Interviewee 7 (Service Operations Director, Turkey)
Interview conducted on 31/01/2014 between 13:00 - 13:30 CET

Interviewer: *What is your main challenge/complain when it comes to KONE CRM opportunities tab layout?*

Interviewee: Basically what we are aiming for 2014 in every business line is to use CRM very efficiently, because as far as I can see and as our leadership team can see, our sales-people feel it is a little bit extra work to put everything in CRM and they are just doing, for example, after they had the order received or if they have a tender that needs to be booked in the system, then they are putting it in CRM. So we are just encouraging our Saleforce to put all starting from the lead and we are also using dashboards and reports to show them that what they are putting in the system means something for us to create the forecast related to our business.

Actually, I don't have a specific complain or hard time coming from Salesforce more than salespeople saying that the tab is full of unneeded categories or information. That's the general complain, that it takes time. But as far as I know, in the opportunities tab some areas are marked with red so needed to be filled in but others are not compulsory so I think it is pretty ok that way, because those compulsory are needed. Maybe if we are just at the budget phase, maybe some things may not mean anything or be needed, but in general what is compulsory is needed so I think it is ok.

Interviewer: *If you would have the power to change the opportunities tab layout what would you do and why? Please mention at least 2 aspects and justify your answer.*

Interviewee: Concerning project information section, most of the times our people are not filling it in except from this "*is pre-tender review required?*" on the modernization side. So I think there are different areas and according to the business lines, there are differ-ent tasking, so for example, on the "*project information*", that part is not usually filled in by sales guys, I'm not sure why. But in that part it asks, for example, "*start on-site date/service start date*", those kinds of things they create them on KTOC as it is sent to SAP with the enabler or everything related to that project, they don't put this information here. But again, "*Project End Date/Contract End Date*", that kind of information is not kept in CRM. Probably they should have, because the only tool that our salespeople can use and see all information is in CRM at the moment.

Interviewer: *How would you prioritize those changes and why?*

Interviewee: I think I should better discuss with our salespeople but the only thing I see at the moment is the "project information" that could be potentially eliminated but maybe having a discussion with them would help us understanding why this is there and why they should actually fill it in.

Interviewer: *Optional question (in case there is still time): There is currently an idea to develop a type of sales workflow within KONE CRM that guides you throughout the steps to complete KONE's sales process. The workflow would prompt you to complete tasks once certain parameters/pre-requisites are met and remind you of relevant deadlines or follow-up needed to be carried out in a timely matter. Right now there is no such guidance in KONE CRM and implementing this idea is believed it could bring major business benefits for KONE CRM users globally. What do think of this idea and why? What benefits could it bring for you/your team in your daily work?*

Interviewee: I think it is good to have reminders because in the daily routine people is really busy and someone or something needs to remind them what to do and when, so it would be a good idea having CRM to remind you of things.

Interviewee's additional comments related to online survey (filled in prior to interview): We are very happy from the support received so far from the CRM team. We still need to encourage our people to use it properly. We do have lots of instructions but we don't always find them very easy to understand, so maybe it would be good to have a shorten version or shorten user guide/manual for beginners. Something like *CRM for dummies*.

Interviewee 8 (Sales Manager, Italy)
Interview conducted on 05/02/2014 between 09:30 - 10:00 CET

Interviewer: *What is your main challenge/complain when it comes to KONE CRM opportunities tab layout?*

Interviewee: Nowadays the activities related to the orders and to the opportunities are done completely by hand. I mean, our principal instrument in our society is SAP, but for sales teams the principal instrument is CRM. CRM is partially synchronized with

SAP but not totally. If you succeed in taking a new order for an extraordinary mainte-nance from a customer, you pass this order inside our team in order to make a handover and then to enter this order in SAP (we first create the opportunity in CRM and once it transforms into an order, we enter it in SAP and it becomes a job for the team).

But without changing CRM, the state of that order in the dashboard, that order remain at the same condition as you had it one day ago, one week before. So I think for the future there should be a better synchronization between SAP to CRM. I think this is the key aspect there because nowadays we have to do it by hand so we are losing time. And it doesn't take much time to do it but if you have to do it on a daily basis, you can imag-ine it happens that our sales people have to invest 30 mins-1 hr per day entering this information in CRM or to change statuses of orders. So I would like to find a solution in order to create an automatic system to refresh CRM dashboard.

My point of view as a sales manager is that everything is ok in the opportunities tab be-cause the dashboards are really active and useful to follow-up my activities, to under-stand and to show things because it has some graphics on it. In my opinion creating an opportunity is quite easy, it takes 1-1,5 minutes to create a new opportunity and what is there is relevant in my view.

Interviewer: *If you would have the power to change the opportunities tab layout what would you do and why? Please mention at least 2 aspects and justify your answer.*

Interviewee: There is not really anything particular I would be interested in changing in the opportunities tab besides what I mentioned already before but what I think is that since CRM is the unique interface between systems and an important base on which we organize the relationships with our customer, I would like to create some different inter-faces between CRM and the different instruments we have in our society in order to summarize all the information we have related to the customer inside CRM. Let me ex-plain what I mean here: I mean that for example, for checking calls, we use a special system called KONECT. KONECT is a specific tool built by KONE in which inside is possible to see all changes related to modes of interact, calls, problems related to the leads, a number of measurements done in the year and so on. I think it would be very

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useful to add all this information directly to CRM so when I am in front of the customer, for example, or when I have to prepare a visit, it is easy for me as a salesman to open my CRM and to see all the information related to that customer. Because when I meet a customer I will explain a tender, for example, I will discuss, I will negotiate a tender.

But it happens very often that my customer asks me, ok Marco, I know that on that lift I have many problems because I did last year 12 calls since the lift was completely blocked. Sometimes this happens also with the people inside the car. So do you know something, could you help me understanding why this is happening and what we have to do. So in this case, nowadays I don't have any information of this inside CRM. At the same time, I don't have these problems in detailed related to collecting credit ready there. So I think that in order to understand about the situation and also to have a history of the work already done on the lifts (services, solutions, etc…), it would be very useful to check interfaces between SAP, KONECT and other instruments inside our society with CRM in order to create a unique source for the salesman to talk about everything with the customer during the visit.

Nowadays we are only synchronize major calls, e-mails, letters and communications in CRM related, for example, to cancellations, particular aspects related to the end of the contract or tender, but there are very few we actually enter there.

Interviewer: *How would you prioritize those changes and why?*

Interviewee: I think that the first one may be to import in CRM the historical information related to the maintenance from KONECT. Because when I am in front of the customer, it happens very often that the customer asks me when did you do the last service activity, what did you find in the last activity you did with your technicians, how many visits did you do last year. And I think it is quite important to keep initiative and inform the customer of the situation of our services and also build the conversation relating to the problems and create new opportunities. The second one is to import all the details related to collecting credit. And the third one is to insert in CRM the history of the extraordinary jobs already done on the lift. I think this is very important because it enables us to give a good overview of the situation of our services to the customer. I

think it is vital to be able to check these details and be able to reply to any questions from the customer at the time of the visit rather than saying that we will check in the office and get back on that. Doing so will save us time in the office and help us making better use of our time to create new opportunities and tenders.

Interviewer: *Optional question (in case there is still time): There is currently an idea to develop a type of sales workflow within KONE CRM that guides you throughout the steps to complete KONE's sales process. The workflow would prompt you to complete tasks once certain parameters/pre-requisites are met and remind you of relevant deadlines or follow-up needed to be carried out in a timely matter. Right now there is no such guidance in KONE CRM and implementing this idea is believed it could bring major business benefits for KONE CRM users globally. What do think of this idea and why? What benefits could it bring for you/your team in your daily work?*

Interviewee: [There was no time to address this question at the interview]

Interviewee 9 (Service Manager, Singapore)
Interview conducted on 07/02/2014 between 08:00 - 08:30 CET

Interviewer: *What is your main challenge/complain when it comes to KONE CRM opportunities tab layout?*

Interviewee: For me, I guess, looking at the information that requires to be completed, only certain items are compulsory. I think we may however be able to cut down on a couple of things, especially when the opportunity may not be realised. It's something like, for example, I am myself in the maintenance business so the opportunities we are looking at can be something similar as to the NEB opportunity where if the opportunity is not going to be realised, the information to be filled in is very minimal. So my main complaint is basically that the tab is time consuming and there are some compulsory fields that could be cut down.

Interviewer: *If you would have the power to change the opportunities tab layout what would you do and why? Please mention at least 2 aspects and justify your answer.*

Interviewee: In KTOC we are able to enter the contract number and the information is being pull up based on the entry of the contract number. For new opportunities, if we are creating an opportunity related to an existing customer or contract, it would be very useful if we are able to pull from there for example, the account name, the market segment, the funding sector, if it would be automatically pulled. Using the same principle while you enter the number you will get automatically certain fields filled in that would save us a lot of time. Nothing else comes to my mind but if this could be done, lots of things could be pulled out while at the moment we need to fill in manually like 10 fields.

Overall I can't think of any other aspect on the opportunities tab but thinking more at a global level, one general comment I've heard from our salespeople is the speed of CRM. It's slow so I think this is something that needs to be addressed. Otherwise, in terms of downtimes, what I've noticed is that they usually happen outside Asia working hours so maybe it is just a coincidence that has work on our favour.

Interviewer: *How would you prioritize those changes and why?*

Interviewee: If we need to prioritize one aspect, I think speed should be priority number one because if the system is slow, what will happen is that people will lose confidence in the system, nobody will feel like using it. So if the speed is not improved, everybody will just stop using it. Productivity is also lessening if speed is not improved. And we are sure this is not linked to local network issues because this problem is only happening with CRM.

Interviewer: *Optional question (in case there is still time): There is currently an idea to develop a type of sales workflow within KONE CRM that guides you throughout the steps to complete KONE's sales process. The workflow would prompt you to complete tasks once certain parameters/pre-requisites are met and remind you of relevant deadlines or follow-up needed to be carried out in a timely matter. Right now there is no such guidance in KONE CRM and implementing this idea is believed it could bring major business benefits for KONE CRM users globally. What do think of this idea and why? What benefits could it bring for you/your team in your daily work?*

Interviewee: There are PROs and CONs. I mean, I can understand the principle behind is good, that we have reminders to prompt us in the completion of activities or

tasks. But in real life what will happen is that there are lots of prompts ongoing, for example, a salesperson is already receiving prompts on customer visits, on the end date of a contract, so in a month the salesperson can be receiving about 30 prompts from customer visits because that is their target, 30-35 customer visits per month. And on top of that every month he needs to negotiate with the customer on contract expiring, so again every month he will be receiving 20-30 prompts on contracts renewal. You end up receiving a lot of prompts. And I think is human that once you receive too many prompts you start ignoring them. I can understand where the idea is coming from is good, but I think we need to see it from the other side, will they be receiving too many prompts?

Another thing to note is that, for example, if I have to complete a task and then I pass that task to you and you to somebody else, if I want to delay the completion of the task it will have an effect on everybody else in the workflow and we may end up in a situation where the last person may have very little time to complete the task to meet the deadlines set because of the delays of others.

Interviewee's additional comments related to online survey (filled in prior to interview): CRM training is an issue of concern I would like to raise here. At the moment Caroline is sharing monthly updates with all key users. The sessions are very informative, where she explains the new functionalities or new enhancements. However, my observation is that for all those key users, they may unfortunately not all be up to that level to understand what Caroline is presenting at the session. And I am not really sure how it works in Europe for CRM key users but in Asia what typically happens is that being a key user is an additional duty added on top of all other current duties you may have. So that person assigned as key user may not even have been trained at all, he is just given this task because maybe he is a service manager, because of his rank or position, but may not even know anything about CRM.

While in other bigger Front Lines they have a dedicated person for that so this person can spend 100% of his time playing around with CRM, testing different functionalities and knows quite a lot. But that's not the case for all. As far as I know, this feedback has not yet been passed to Caroline. But what I have done is to pass this feedback to Louis, who is the Sales Director for APM countries. I have suggested to him that maybe for

CRM key users, they should receive some extra CRM training. The APM countries are a mixture of small and big countries so the structure set up is also very different. They are given this role I would say mainly because of their current position so usually sales managers would be assigned to it so called automatically.

And the cascading of information from key users to other users is not happening as it should. I can guarantee you that most of the information is being lost or not passed along. And this is for the pure reason that the key user attends the training given by Caroline but because of his skill level, he may not be able to understand what Caroline is saying. If he/she is not able to understand, he/she won't be able to pass on the message to other users. And even if the training materials are shared after the session, the key users' skill level and the time constrains make it very difficult for him/her to communicate the outcome of the sessions to other users.

Interviewee 10 (MP Salesperson, Russia)
Interview conducted on 14/02/2014 between 10:00 - 10:30 CET

Interviewer: *What is your main challenge/complain when it comes to KONE CRM opportunities tab layout?*

Interviewee: Sometimes to find as much as I can information about the clients. So to input some data about his habits, too much data to be filled in CRM, which we have in our e-mail accounts or in Team Flow. I try to input the data from various sources to CRM so anybody else can read it if it is necessary. So basically it's a time issue because there is a lot of information to be filled in which is already in other sources.

Interviewer: *If you would have the power to change the opportunities tab layout what would you do and why? Please mention at least 2 aspects and justify your answer.*

Interviewee: There are too many things here and actually I don't really fill all of them. But I know this information may be needed by somebody else that's why I cannot just complain. One idea would be to define the roles in CRM better, so depending on your role, you would only see those fields that are relevant to your business line, not to see so

many fields. For example, *Opportunity Category* (not sure if this is linked to the opportunity of the lead), *Contract/Tender #, New Contract #* (I think these are redundant here, maybe they should have been put in another page later), *Customer Assessment*, *Primary Campaign Source*. Maybe *Win/Loss information* should not be in the first page either.

Interviewer: *How would you prioritize those changes and why?*

Interviewee: Setting up views of the opportunities tab based on your business line would be my priority so that we don't see so many unnecessary fields there.

Interviewer: *Optional question (in case there is still time): There is currently an idea to develop a type of sales workflow within KONE CRM that guides you throughout the steps to complete KONE's sales process. The workflow would prompt you to complete tasks once certain parameters/pre-requisites are met and remind you of relevant deadlines or follow-up needed to be carried out in a timely matter. Right now there is no such guidance in KONE CRM and implementing this idea is believed it could bring major business benefits for KONE CRM users globally. What do think of this idea and why? What benefits could it bring for you/your team in your daily work?*

Interviewee: I think it would be useful to have something like that. But I think we still need to get more feedback from others on how the see this idea to have a more synchronized picture. I think it is needed to have reminders because is human to forget things so we need some kind of reminders.

Appendix 5. KONE CRM end-user survey results (Second Round)

1. Your name

Number of respondents: 11

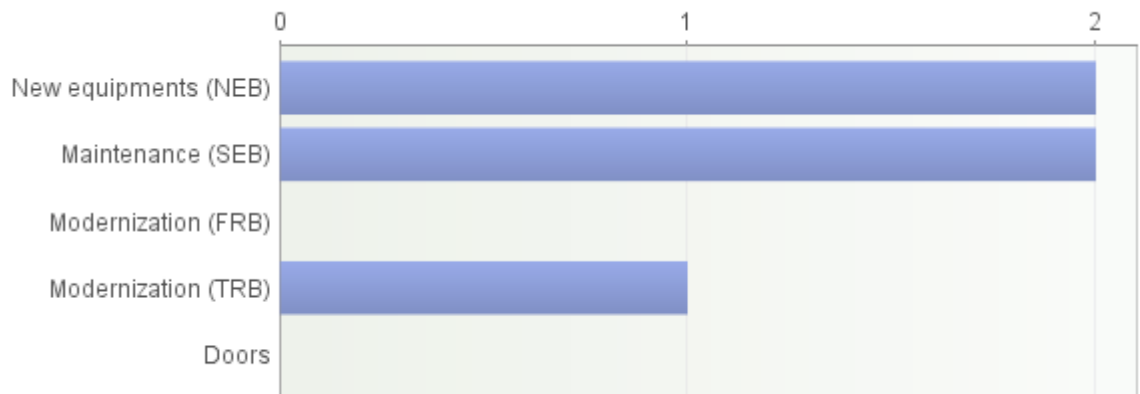*(Names of interviewees removed from this report for confidentiality reasons)*

2. Your country
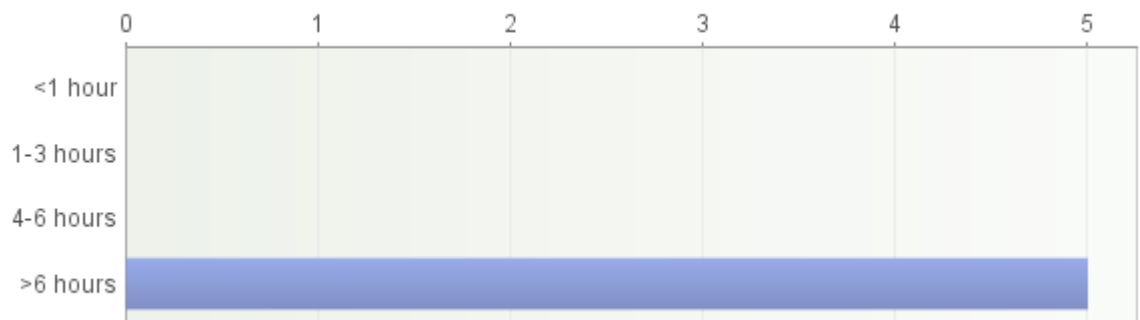
Number of respondents: 5
- UK
- UK
- UK
- UK
- UK

3. Your main business line

Number of respondents: 5

4. What is your average weekly login time?
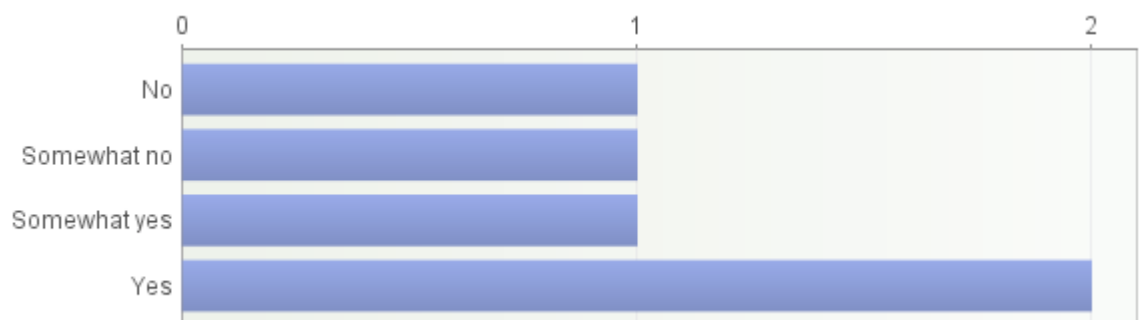
Number of respondents: 5

5. Please rate the following statements concerning KONE CRM

Number of respondents: 5

	Strongly dissagree	Somewhat dissagree	Somewhat agree	Strongly agree	Total	Average
You know which customer data you are expected to enter in KONE CRM	0	0	2	3	5	3.6
You systematically create accounts in KONE CRM for your prospects and customers' projects	0	0	3	2	5	3.4
You enter/synchronize all customer contact information to KONE CRM	0	1	3	1	5	3
You enter/synchronize all customer e-mails to KONE CRM	3	1	0	1	5	1.8
You enter/synchronize all customer meetings to KONE CRM	0	0	3	2	5	3.4
You report all customer phone calls to KONE CRM	3	2	0	0	5	1.4
You use KONE CRM reports and dashboards to review your sales activities with your Manager	0	1	0	4	5	3.6
You know who to contact in case of issues/questions regarding KONE CRM	1	2	1	1	5	2.4
Total	7	7	12	14	40	2.83

6. Have you received sufficient training regarding KONE sales processes?

Number of respondents: 5

7. How useful is KONE CRM for your daily sales work?
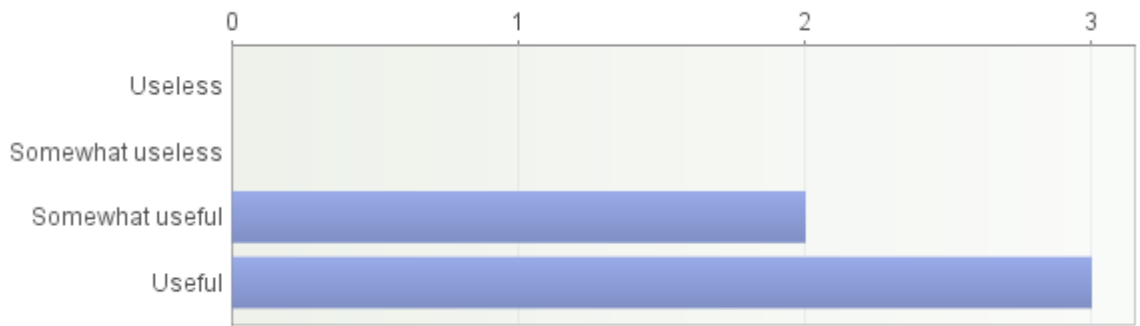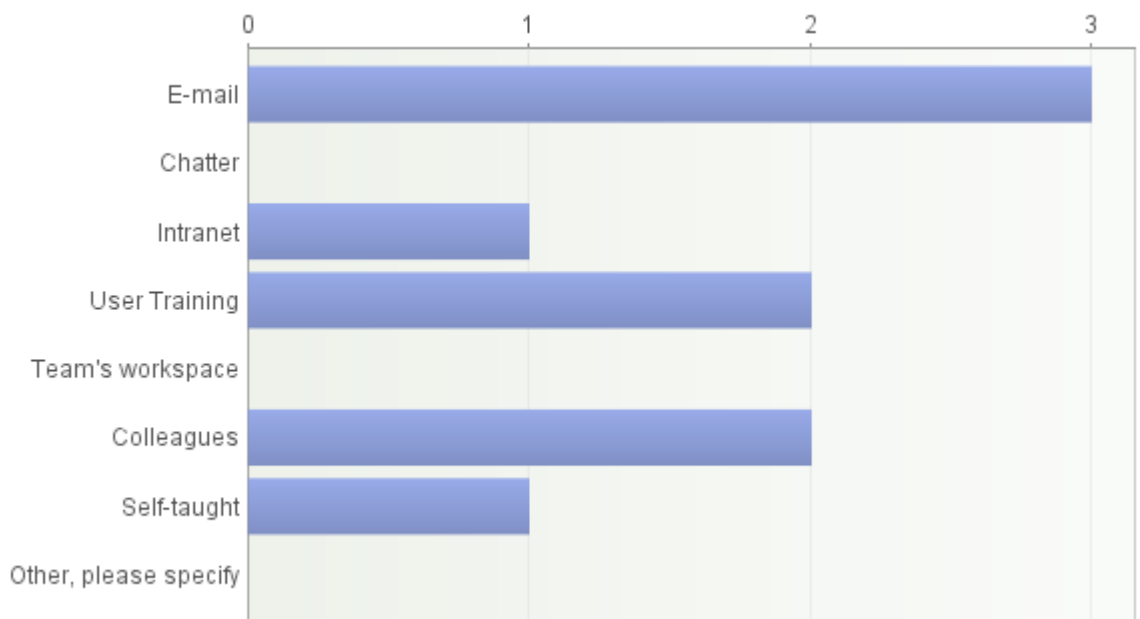
Number of respondents: 5

	0	1	2	3
Useless				
Somewhat useless				
Somewhat useful			2	
Useful				3

8. How easy or hard is it to use KONE CRM?

Number of respondents: 5

	0	1	2	3
Very hard				
Somewhat hard		1		
Somewhat easy		1		
Very easy				3

9. How do you like to receive news and instructions about KONE CRM?

Number of respondents: 5

	0	1	2	3
E-mail				3
Chatter				
Intranet		1		
User Training			2	
Team's workspace				
Colleagues			2	
Self-taught		1		
Other, please specify				
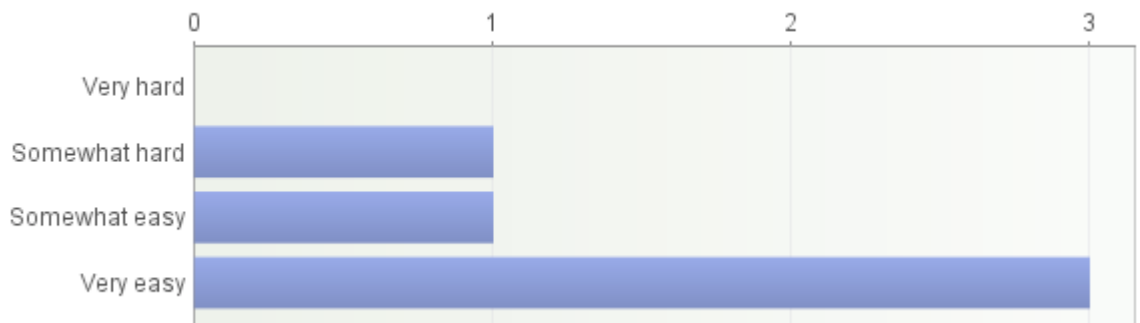
10. The amount of customer data that needs to be entered into the system is

Number of respondents: 5
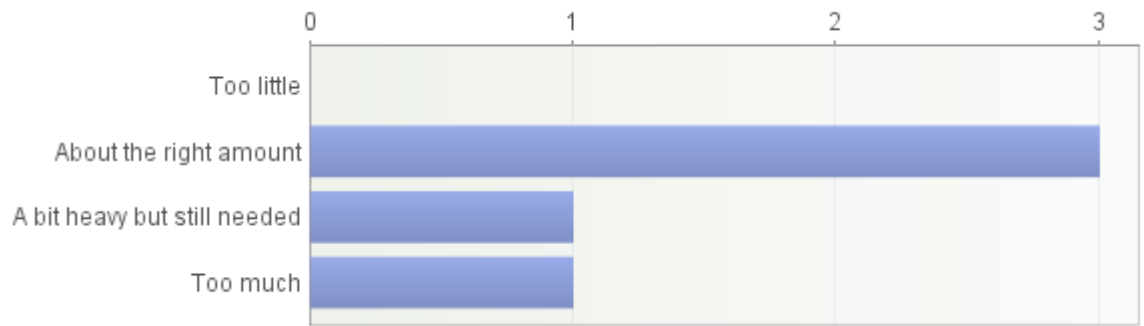
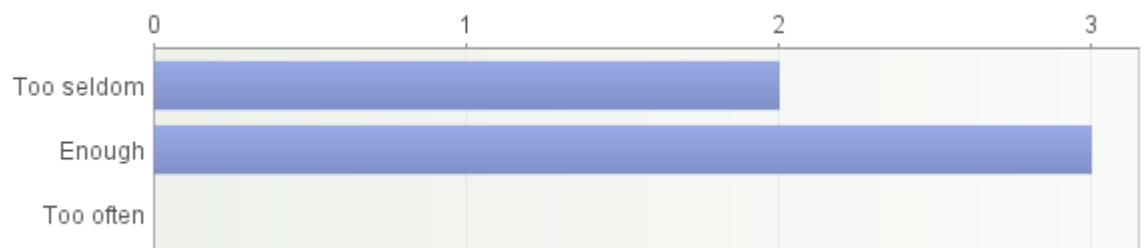**11. The communication about new features is**

Number of respondents: 5
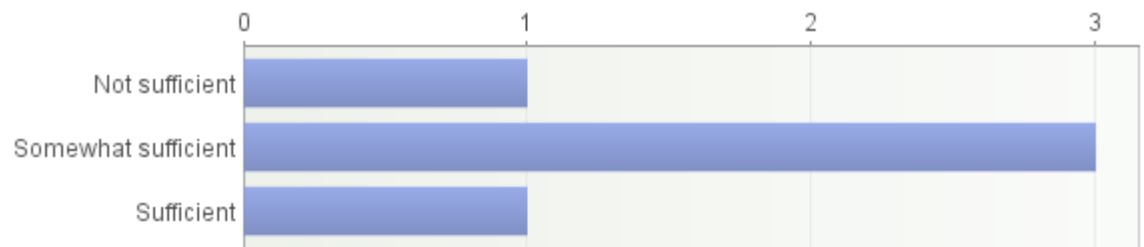
12. Monitoring activities and sales in KONE CRM is
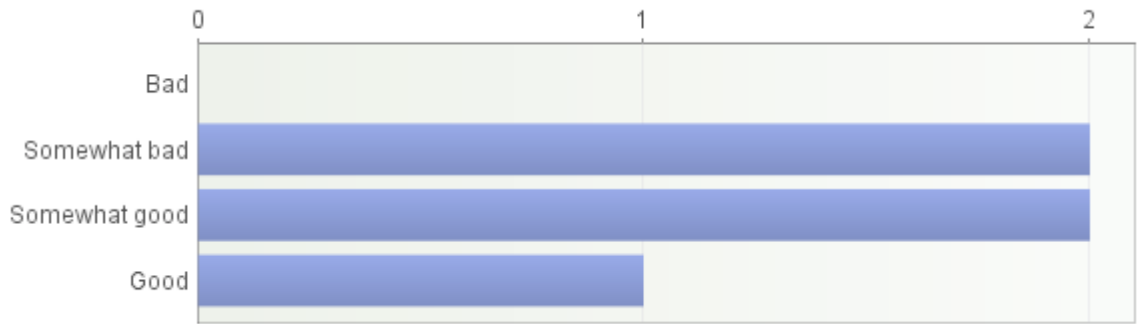
Number of respondents: 5
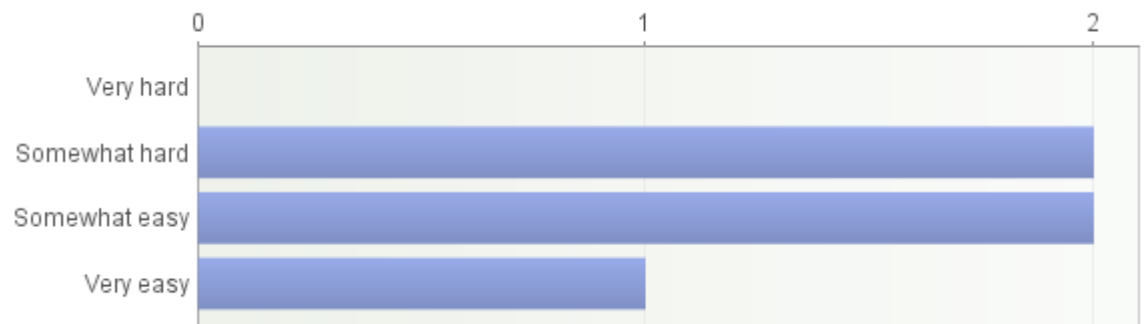
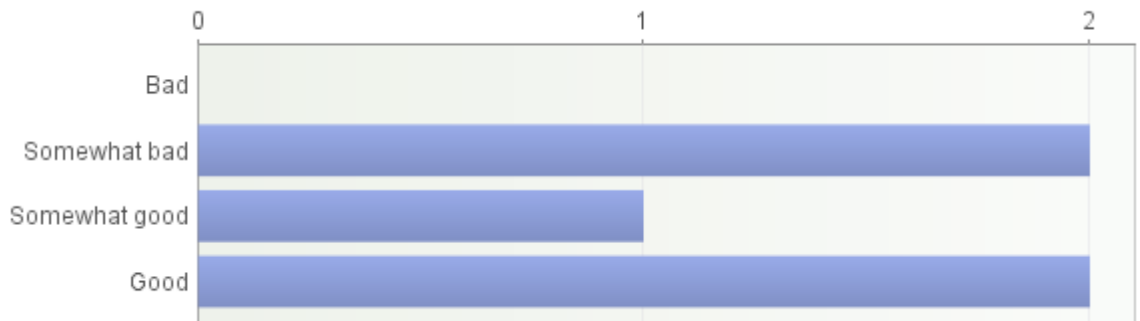**13. The frequency of KONE CRM training is**

Number of respondents: 5

14. The quality of KONE CRM instructions and documentation is
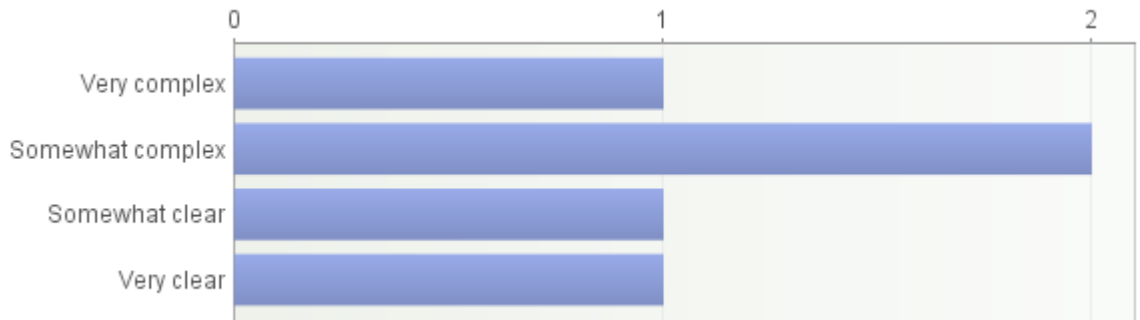
Number of respondents: 5

15. The quality of KONE CRM instructions and documentation is
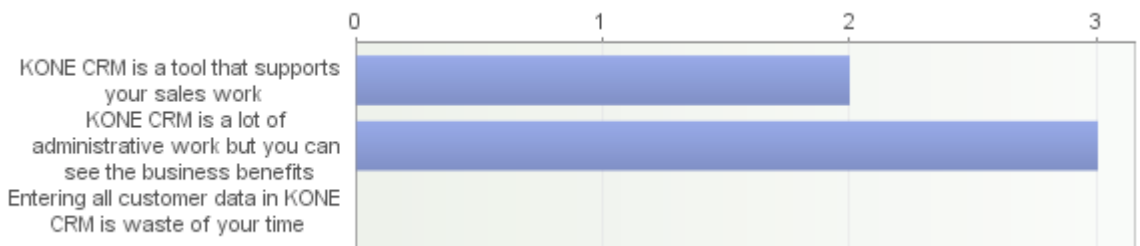
Number of respondents: 5

16. The sales processes are

Number of respondents: 5

17. Finally, choose the statement that represents best your opinion of KONE CRM

Number of respondents: 5

Targeting improved user experience in KONE CRM opportunities management

MBA Thesis Focus Group Discussion
KONE Chertsey, 14th November 2014

Participants' Introduction

KONE

All names and job titles listed in this slide were removed for confidentiality reasons

2   11/11/15   Confidential | © KONE Corporation | MBA Thesis Focus Group Discussion | Diana Parada

Focus Group Agenda

1. Participants' introduction (i.e. name, role & usage of CRM) – **10 mins**
2. Introduction by Caroline Bondier: thesis background and motivations for topic selection – **5 mins**
3. Research scope, objectives and selected themes from first interview round by Diana Parada – **10 mins**
4. Focus group discussion with pre-defined questionnaire – **80 mins**
5. Conclusions and Q&A – **15 mins**

Research Scope & Objectives

Thesis Topic	Key Drivers	Description
Targeting improved user experience in KONE CRM opportunities management	*Research Scope*	KONE CRM opportunities tab / Management of opportunities in CRM (continuation from previous work carried out by Caroline in 2012)

	Objectives	1. Gather input on the opportunities tab → improve users' experience, foster adoption, and facilitate overall sales efficiency across KONE CRM users globally
		  1. Explore potential areas for further developments and simplification of the tab
		  2. Serve as a forum for exchange of ideas, consultation and validation among KONE CRM end users
		  3. Serve as input to the KONE CRM roadmap for 2014-2015 and/or 2015-2016

	Research Questions	1. What are the main areas of concern raised by end users when creating and maintaining opportunities? 2. Which simplifications or further enhancements could be made in the opportunities tab that could positively trigger user experience and foster adoption? 3. How feasible are the simplifications and enhancements identified? Which ones should be treated as priority, which ones could be postponed, and which ones can't be implemented in the current situation and why?

First Interview Round – Overview

KONE

- Main objective: collect ideas/feedback/development proposals to simplify or further improve the tab / share experiences
- 10 one-to-one telephone interviews (sales people and sales manager across KONE offices)
- Pre-filled KONE CRM end-user survey (webropol based)
- Interview questions:
  - ✓ *Question 1 (Q1): What is your main challenge/complain when it comes to KONE CRM opportunities tab layout?*
  - ✓ *Question 2 (Q2): If you would have the power to change the opportunities tab layout what would you do and why? Please mention at least 2 aspects and justify your answer*
  - ✓ *Question 3 (Q3): How would you prioritize those changes and why?*
- Additional comments from KONE CRM end-user survey and other feedback
- Transcripts produced, colour coding technique used to define categories and main themes selected

First Interview Round – Selected Themes

KONE

Theme	X in Q2	X in Q3
1. Make win/loss information mandatory	1	1
2. Add field description/additional details	2	N/A
3. Previous Contract # field	1	1
4. Re-define stages of probability	2	2
5. Allow having main customer and subsidiaries under it	1	N/A
6. Enable several accounts being added/linked to the same opportunity	1	N/A
7. Enable new opportunities being automatically populated out of existing data	1	N/A
8. Built estimate sheet into Salesforce to allow quotation being done in CRM and its data being pull to automatically populate the opportunity	1	1
9. Develop interfaces between CRM and other KONE systems	2	1
10. Define roles in CRM and set-up views of the system based on assigned role or business line	1	1
11. General KONE CRM Proposals • Invest on tablets for salespeople • Allow extracting reports with consolidated information of a client • Improve CRM speed	1 1 1	1 N/A 1

Focus Group Discussion - Overview

KONE

- Main objectives: validate results from first interview round & collect ideas/ feedback/development proposals to simplify or further improve the tab / share experiences
- Face-to-face focus group discussion, 5 UK-based sales people – open and very interactive dialogue, qualitative approach
- Pre-filled KONE CRM end-user survey (webropol based)
- Focus group questions:
  - ✓ *What do you think about the themes that emerged from the first interview round? (Tour de table)*
  - ✓ *Which one would you support the most and why? (1-3 grade scale)*
  - ✓ *What other simplifications/further enhancements would you like to see implemented in the opportunities tab and why? (Affinity Diagram)*
- *"An **affinity diagram** helps to synthesize large amounts of data by finding relationships between ideas. The information is then gradually structured from the bottom up into meaningful groups to begin your analysis or come to a decision"*

Focus Group – Validating First Round Themes

KONE

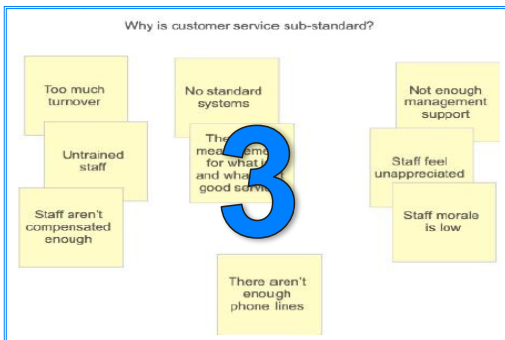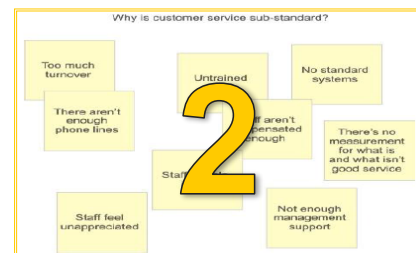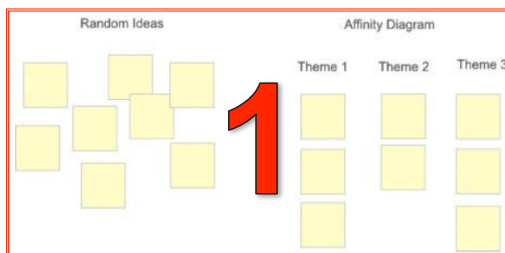*Which one would you support the most and why? (1-3 grade scale)*

Theme	Rating from 1 (low) – 3 (high) on first round's selected themes					
	P1	P2	P3	P4	P5	Total
1. Make win/loss information mandatory					1	1
2. Add field description/additional details						
3. Previous Contract # field						
4. Re-define stages of probability						
5. Allow having main customer and subsidiaries under it						
6. Enable several accounts being added/linked to the same opportunity		3	3	2	2	10
7. Enable new opportunities being automatically populated out of existing data				3		3
8. Built estimate sheet into Salesforce	3					3
9. Develop interfaces between CRM and other KONE systems	2	2	2	1	3	10
10. Define roles in CRM and set-up views	1	1	1			3

Conclusions and Q&A

To be completed at the session

THANK YOU VERY MUCH!!!