

# **Improving customer information sharing within sales team**

Case Atea, BtoB sales team

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Abstract  <p>The purpose of this thesis was to identify the weaknesses of customer information sharing processes within Atea AS and propose possible solutions to the identified problems.</p> <p>Internal processing and sharing of customer information is a competitive advantage of an organization. It requires a free flow of information sharing between different parties. A review of the literature on organizational structure and information sharing was conducted to examine the research in this area and highlight beneficial changes within Atea AS.</p> <p>The results of study underline the need of data input rearrangement for the development of a more efficient customer relationships management software within Atea AS. The results were based on an interview process within the company and on an attempt to create common perception on how customer relationship management software could bring more value.</p> <p>According to the results, customization of specific fields within the Microsoft Dynamics solution should be implemented in order to bring the relationships with the customers to a strategic rather than an operational level.</p>		
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Miscellaneous		

CRM software	Category of software that covers a broad set of applications designed to help businesses manage many business processes: customer interaction, access to business information, automate sales and customer data.
Customer Knowledge Creation	Process of systematic data collection, bringing value to the sales process.
Sales pipeline	Systematic and visual approach to selling a product or service. The sales pipeline is helpful in showing exactly where the money is in the sales process.
Customer Satisfaction	Customer satisfaction is a marketing term that measures how products or services supplied by a company meet or surpass a customer's expectation.
Full Customer Cycle	Term used to describe the progression of steps that a customer goes through when considering, purchasing, using, and maintaining loyalty to a product or service.

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# 1 Introduction

## 1.1 Aim of the study

Automation of processes in the current state of business life has reached the level when every completed daily operation aim to be quick, cost-effective and value-added. Emphasis on improving both internal and external communication within companies is a strong strategic point.

Even though business gives purpose this overall trend, big parts of successful operations, such as customer relationship management in SMEs and bigger companies, still rely heavily on employee based knowledge and not on one tracked by IT. This brings not only a lack of knowledge of the customer base, but also creates plenty of misunderstanding within the company operations.

When only one specific employee has important information related to a customer, it will eventually bring problems such as miscommunication, lack of competence and missing important aspects of the customer's business. Not implemented or incorrectly implemented systems of customer relationship management also bring internal problems to companies. The typical problems are:

- missed opportunities
- poor customer service and dissatisfaction
- lost "know-hows" of employees in case of their leaving the company

Research show that about 5 % reductions of lost customers on the organizational level could bring at least 25% of the organizational profit defined by Nitu *et al.* (2014 303-310). This percentage can be even higher since the level of actual cooperation and mutual needs within "business to business" sales would be difficult to express numerically.

Presented study examined what information would be crucial to be stored within the CRM systems for internal usage by the different units of an organization and how the creation of useful data input from the employees' side could be possibly arranged. The

main goal was to keep at least the same level of customer service in the whole organization. This should help avoiding situations of customer dissatisfaction in separate organizational units due to lack of specific knowledge of customer needs in the employee's side.

Traditionally, CRM systems (Customer Relationship Management systems) are described as software applications based either on internal or outsourced services used from "Clouds". These systems have been created to automate interaction with customers. These systems are typically used for improving sales processes, optimizing marketing operations and improving relationships with the customers. This is done by preserving information about the customers and interactions with them, establishing better business processes and analyzing data gained from the customers (Williams *et al.* 2014).

This thesis deals with the process of improving internal information sharing in B2B sales and focused on the case of IT service provider Atea AS. The thesis addressed the current state of information shared in the CRM system by underlining the collection process and how data input appeared as well as how information was shared and what features were available for data sharing among the teams. By comparing this data to the best possible practices and by having internal discussion among the teams, author aimed to propose needed improvements of working with the CRM solution in order to decrease the number of missed opportunities and increase customer satisfaction level.

It is important to note that along with a CRM system (used as a tool), companies are free to introduce any other tools needed to create processes that are more efficient. Currently, in case of Atea AS there is an ERP system in place, an internal Skype for business and a Stargate system (an internal cloud-type file sharing platform). For specific units, Atea AS has created a ticketing system of problem solving. This means that every time a customer address his question to Help Desk, a ticket number is attached to the mail, and then the progress solving the problem is tracked through status change.

## 1.2 Research questions

The main research question was how to create better information sharing between the structural units of the case organisation and specifically between the specialists of different units. To reach an understanding of the possible solutions this question was followed by:

1. What kind of modules and information there are currently available in the company's CRM system?
2. What is the current process of CRM data collection in the company?
3. How could information sharing be improved in the current system?

It is important to note that the reason for introducing a CRM system in the beginning of the research process was done intentionally by the author, since the classical means of internal communication such as mailing clients (Outlook; Thunderbird etc) are lower domains of the system and by default included in the tracking of CRM systems.

## 1.3 Limitations

Internal communication is a complex multi-disciplinary topic and it should be approached accordingly. The major scope of research is shifted towards tools of establishing efficient internal communication and knowledge sharing. Therefore, such tools as CRM software are a major focus. The thesis focused on the internal communication strategies for employee enablement by the effective use of the CRM system. In other words, it focused on the communication efforts made to promote effective and positive employee communication behaviours in the CRM system.

As this report only considered the practical side of better information sharing practices, many technical aspects of implementation from the programming point of view were excluded. Introduction to the back-end of the system is in the literature review and a specification of the CRM systems used by sampled companies presented in a results of the thesis. However, the proposed effective improvements within the system required the involvement of programming skills in "back-end" side of development. Therefore, it was excluded from this study.

Internal communication within the organization and communication with the customers were there in the focus. Therefore, communication with suppliers and distributors of products was not considered in this study.

Another limitation factor was the encouragement of CRM system usage within the case organisation. Issues related to the overall motivation of the employees to fill necessary data for the CRM system dictated by the culture of documentation processing. The author acknowledged this problem, but in the presented study, this problem was not applied to the suggested solutions. This phenomenon can be its own field of research since this area is more based on human – software interaction. In other words, how user friendly is specific type of the CRM and how data input can be rearranged so that employees would be motivated to complete detailed data input. Vella *et al.* (2012 121-133). These topics are covered in the literature review, but in the actual study they were given lower priorities, since the systems that already in place in the case companies could not be rearranged and improvements were proposed to the already existing infrastructure.

## **2 Literature review**

### **2.1 Internal communication**

Successful internal communication is dependent on established practices within an organization. Communicative actions of an employee are only a part of success and in order to achieve effectiveness on the strategic level of an organization, a set of actions should be introduced. Most importantly defined by K. Ruck (2017 37-44) we can highlight:

- Quality of strategic planning;
- Deep understanding of business on the internal level in order for it to resonate with the senior executives;
- Tools of internal communication (the main focus in the thesis);
- Evaluation of progress and enabling data for a comparative system;

The greatest benefit from a communication tool is gained when a two-way channel of communication is enabled with that particular tool. Understanding the particular

problem that an employee would like to describe and giving the possibility for him to do that is essential. It helps to eliminate situations where employees would not share possible problems or opportunities.

Successful internal communication as introduced by K. Ruck (2017 95-103) should not be implemented in order to keep everyone busy with their task, but to make employee busy with the right activities that add value to the overall processes and therefore bring the needed business outcomes. There is a serious misconception regarding delivering outputs and outcomes in the internal communication process. Communication tools should not be a focus for strategic leadership. Instead, they should help answering the following questions:

1. How does an internal communication tools contribute to strategic objectives?
2. What are the biggest challenges of an organization and is it possible to demonstrate that an internal communication tool can resolve those issues?
3. What behavioral changes are encouraged by the communication tool?

An internal tool of communication and information gathering should be done so that those questions are enabled strategically by the tool in use.

The literature review is based on deeper research on a Customer Relationship Management tool as a possible solution. This fits to the organizational needs and gives sufficient functionality for answering the strategic questions proposed earlier in this chapter.

## 2.2 Customer relationships management software

CRM (Customer relationship management) software is a corporate information system. It is a universal tool, which is widely used by businesses of different fields all around the globe. The main purpose of this software is to automate interaction with customer and process of sales, by building up operations in the correct order with an aim of optimizing results as mentioned by F. Buttle (2015 20-25). The features of CRM include: Quick access to up-to-date customer information and increased speed of cus-

customer service and deals registration by adding a degree of automation to those operations. Moreover, the software includes automation of documentation exchange, quick reporting features and control of management operations within an organisation and the establishment of cooperation between the different units of the organisation.

The Data concentration and communication tools described previously, became popular back in 1990s. It was a result of development in IT software functionality (Pedron, 2016). However, even today there is no common acceptance of what is considered being CRM and what modules it includes. Therefore, companies implementing these systems take into consideration their own practices and needs and naming those joined modules as the CRM system of the company. High level of customization can therefore, could be found in companies based on their markets, type of activities, internal operations and other functional aspects.

Francis Buttle in his research (2015, 25-30) presents the following, currently available types of CRM:

- Strategic type: The focus is on a customer-centred culture of business leading and on the development of a culture dedicated to up-keeping a full customer service cycle. The type focuses on creating value for the customer in order to improve the competitiveness of the company on the market.
- Operational type: It is the automation role of CRM. By introducing automation in such operations as product configuration, opportunity management and contact management, extra time resource are released. Working with the customer with no loss of customer is tracked here.
- Analytical type: focused of collecting, up-keeping and processing data into reports related to specific customers and the overall performance of the company.
- Collaborative type: a functionality related to the correlation of information for different parties. It can involve inner units of the organization or outer parties related to the company (e.g. suppliers, distributors, service providers etc.).

In reality, most CRM software developers are in favor of the idea that CRM as a universal tool should give all this functionalities (possibly with different permissions for different users and administrators of the system).

Established on the corporation level, CRM tend to combine different functionalities of the operational areas within a company with a purpose of optimizing and creating a more efficient customer experience. Ultimately, this is the main purpose for establishing a long-term relationships in the sales process. Effectiveness of a CRM tool in this case allows sales teams, supply chains, services, financing and marketing to create their prospect of approaching the customers. Necessary task split created with a specific period of time-frame allowing tracking of transaction status.

It is important to note that this not only gives a possibility to assign tasks from one division to another (e.g. logistics will know exactly when a deal is won and can process the order status), but also creates common knowledge for the whole organization, so that each employee can answer customers' questions of what is the status with their products or service development is.

### 2.3 History of CRM development

John Henry Patterson who was a manager of National Cash Register introduced creation of the first systemized archives for customer data (Nelson, 2017). This company introduced the first framework of the methods used in a trade process.

Back in 1911 Jam Handy who worked in advertisement agency Chicago Tribune was researching on the reasons for customers to purchase a specific types of goods. He assumed that utilization of the banners and short movie clips was giving big advantage to the sellers who was using those tools. The classical operations of the selling process at this point became obsolete.

In the end of 1950s lawyer Morris Perkin from Pennsylvania State developed «Day-Timer» multifunctional system for arranging of business meetings and events schedules. The system contained reminders about future events and was playing role of the time planner. In addition, it would also contain information on the tasks completed during those meetings and events. Therefore, system of reporting introduced within «Day-Timer». This system became international reseller in 1960s as a necessary tool

for successful planning and execution of operational level. Although, company changed its owners many times, Day Timer Ltd. Divisions are still on the market of CRM solutions.

In the beginning of 1980s amount of CRM systems on the market was quite limited. However, cost of the IT technologies started to drop down and new opportunities made it possible to build up needed automation within systems. The first commercially available software developed by the Contact Software International was introduced back in 1987; The software was called „ACT!“ and it would give possibility for the sales people to track relationships with a customers, gain and process their data.

From this point CRM became the termin for system of a direct automation for client orientated sales. Termin CRM itself came from the company called Siebel Systems. They named it in order to refflect type of corparate software.

Historically, understanding of the customer-orientated technology developed into the idea of keeping the created knowledge about the customer and processing it into the competitive advantage. Allowing accumulating of the data through execution of the sales operations (Dysart, 2014). In a big companies, this idea of the customer orientation would also mean that there is no need to push all possible goods and solutions to each particular customer. Instead, company should assess needs of every customer and create specific products or service packages.

## 2.4 Customer knowledge creation and portfolio management

Customer portfolio management surely is one of the key aspects of maintaining relationships with the customer. Customer knowledge on its own is a valuable asset and processing gathered customer data into structured information is a competitive edge on any market.

Ability of organization to receive needed information depend on many factors, but major aspect is ability to work with different sources. To support this idea, researchers propose four-level process in which described how knowledge created and how it is expanded:

1. Socialization (Tactical information gets shared trough social interaction);

2. Externalization (formulating overall tacit knowledge into explicit knowledge that can be shared within organization)
3. Combination (integrating different sources of explicit knowledge to create new knowledge)
4. Internalization (understanding explicit knowledge and integrating it into business practices)

However, customer knowledge itself can be presented depending on the flow of particular data. It is important to separate knowledge created for customers. This is a valuable asset of particular knowledge, generated by company. This is essential time resource investment in order to attract customer and keep level at least on the level of expectancy. Other direction is information about the customer, something that relates more to the background of specific customer, motivation and preferences unlock additional competitive advantage in this case. Knowledge from customer is hard to collect data, since it relies a lot on interaction with customer. Successful companies, who invest their time resources for this knowledge, are able to utilize this data later on for their customer service satisfaction tracking.

CRM systems according to C. Stefanou (2003 617-634) easily compile all necessary data keeping needed format and providing visualization for specific Key Performance Indicators of companies operations. In his research, Michael Gibbert (2002) argue that CRM system traditionally focused on gaining knowledge about customer, customer knowledge is moved more towards receiving it from customer directly.

Customer knowledge management proposes different approaches or styles to unlock needed potential:

- Prosumerism or co-production; In this case customer is taking two roles both consumer and producer. Those examples include cooperation among Bosh and Mercedes-Benz; Both parties are aiming to complete end-product and lead to mutual interactivity for their final goal.
- Team Based co-learning. It focuses on reconfiguring entire organizations and systems of value. Ideally, internal resources used in order to develop and maintain new vision. Such example would be greater development of internal base

within Amazon platform, which unlocked possibilities for companies to utilize know how of amazon and implement them in their operations.

- Mutual Innovation. Main drive of product innovation is coming not from production side, but rather end-user dictates what should be introduced to the market. This idea is widely spread currently in open-source information idea. Companies are willing to introduce their knowledge in order for enthusiasts and people to create their input.
- Communities of creation. Those are reflected by the process of putting together customer groups of expert knowledge that interact not only with the company, but importantly also with each other.
- Joint Intellectual property. It is the most intensive collaboration on the base of knowledge management. Dedication towards development is expressed by inclusion of customer to organization. Customer education and the consumer movement through joint knowledge ownership and its continuous development. Instead of just co-producing products and services together, customers and company co-create future business together (Gibbert, 2002).

Creating customer knowledge heavily relies on the fact if system is utilizing correctly analytical side, rather than operational. It is important for organization not only create platform of interaction and building relationships with customers, but also ability to gain knowledge using any style or approach company finds it necessary. Systems should be able to process both internal (already existing) and external (future expectation) customer knowledge overview.

Many industries are taking knowledge creation for granted (Myron, 2015). Possibly, because it is described as a feature of CRM system and it is embedded to the process by default. Therefore, successfully implemented CRM system would capture prospects and customers data and track their interactions within company. All of this is data, but it is important to remember that CRM system is as good, as the data placed within it. Not all data can be useful, in fact some data might even do harm to business. Researches showed that about 20 percent of company's data becomes outdated each

year, due to human factor of employee inserting the incorrect data and customer profile change that were fixed (such data might include new address, new contact person, industry type etc.). In this case, if organization is incapable of preserving the quality of its data in next two years, at least 40 percent of it will be incorrect.

However, information flow through company can be flooding organization due to unclear operational processes put in place. It is another reason to recognize knowledge creation (Myron, 2015) as one of the major components of successful CRM. Traditional communication channels as emails and phones are big part of operational level. However, customer is actively using social media, Web resources and mobile devices. So company is ending up receiving more data than it was before including not so critical data for company. Organization should create a measured approach to data analysis within organization in order to take action on the most important and relevant data processed.

Overall, it is clear that businesses are not searching for solutions to analyze huge data streams produced by customers. This cuts possibility to create predictions based on quality info received from big data. Ideally, transforming those predictions into triggers for the right course of action and it would bring opportunities available in this case. M. Minsker (2015 30-33).

Customer knowledge creation is closely interconnected with profiling of companies. Most of the companies would use specific labels for the sizes of companies and for field of operations. Customer portfolio itself would stand for collection of mutually exclusive customer groups (Buttle, 2015) and therefore, customers are set into clusters according to strategically chosen by the company properties or tags.

## 2.5 Customer relationship management and customer experience

Introduction of CRM system within framework of customer experience brings a variety of outcomes mostly for a greater good, but occasionally it can bring harm for the company's operations.

Customer experience itself could be described in many ways. On a simplest level, it is feedback or response to external actions. Every process, person, technology, product

to which customer is exposed is a part of overall paradigm in customer experience. Field of activity is playing major role in shaping customer experience. Every interaction of customer with company system, e-commerce, sales agent etc. contribute to overall score of experience they are getting.

Such field as e-commerce, where human-to-human interaction put aside and search engine optimized in order to ease product selection is still a major contribution factor for customer experience (Zhang, 2013). Such aspects as user-friendly interface would be first thing customer notice landing on the page. In case if finding this page was difficult for customer, customer experience drop down below their expectations. Other processes as delivery, sales support, data availability described as total customer experience. Therefore, overall experience effects on customer vision for particular organization, taking into consideration value and service quality that he gets. Therefore, total customer experience directly affects loyalty.

Taking as an example of customer experience, single interaction of customer and company in a form of product query. In fact, company could receive huge amount of calls and emails this day. Therefore, when customer would be asked for feedback on previous experience, it would never be just product related question (Rawson, 2013). Context of a speech delivered by customer would be a key indicator of this idea. Customer from his side could address questions regarding warranty, request for additional data and ask for technician services. Company, which could complete so-called complete customer experience, would not only create valuable individual transaction, but also would have new data set for broader picture, addressing key issues from accrued phone call opportunity. Ultimately, creating loops of feedback for establishment of continues improvement process.

## 2.6 CRM software functionality and performance measurement

The technological market of CRM software remained continues growth with moderate phase in the last years. Revenue of the worldwide CRM software market in 2014 was 23.9 billion of US dollars. Most of the market is dominated by key players of the software market such as Oracle, SAP and Microsoft.

Depending on the needs assessment and the internal audit a company is able to develop any type of the CRM software available on the market, depending on which will fit them the most. In the current situation, companies should not only understand that a user interface brings a more efficient use of the software from the knowledge creation point of view (employees' data input). Most of the trends within CRM system development represent the idea of simple and intuitive interface.

The advantages of such approach in interface development can be observed on the example of Pipedrive. This cloud-based system allows users to create the activity pipelines for the opportunities within sales, marketing or other organizational units. However, compared to the traditional systems, Pipedrive utilizes the social networking aspect more intensively. Interactions among the users within network are easy and collaboration online becomes much more efficient.

The system flexibility is also important feature needed for successful CRM implementation. Especially in the case when company needs to invest in their IT hardware and software in order to establish their operations within CRM. Most of the IT service companies are offering „SaaS“ or Software-As-A-Service licencing and delivering model. Meaning that the company is outsourcing whole process of the IT development. The data of their „Cloud Services“ would be stored not locally, but in fact it is stored on the bigger servers around the world.

As CRM is highly customizable software due to the need for distribution to the different companies with the different fields and business models. However, some modules and plug-ins arrange basis for the CRM application. Those modules include tools of automatization for marketing, sales and service processes (Gneiser, 2010).

Ann All (2014) in her research concludes that Data integration within the CRM systems should be much more important aspect, rather than the interface development. In her report she is actively addressing issue of usability for CRM. Considering the example of sales people, it is important to offer a simple tool to create the deals. The sales people are still using their own tools such as spreadsheet – which are certainly not pretty, but those include the necessary functionality. In other words, that is how the sales people get their business done (All, 2014).

The integration of CRM software, is an important aspect on itself. It is absolutely essential tool for businesses willing to leverage their CRM systems in order to create the more holistic customer experience. It is a big challenge particularly for the mobile CRM solutions. Scattering data across multiple, siloed systems makes it nearly impossible to maintain the kind of end-to-end CRM processes needed to deliver that elusive customer experience.

Over the course of the last decade integration from technological point of view became easier. Most of the software includes application programming interfaces (APIs). Those can be described as the knots to interconnect different tools and data streams into one system.

But considering all functionality of the CRM system, and the variety of information pieces within it: how would it be possible to address performance of this system? IT application needs to be assessed on its' performance efficiency. The performance measurement would help to evaluate whether an investments directed to these areas are worthwhile.

In his research, W. Venturini (2015 856-875) found out that the main dimensions of performance are operational benefits, the customer life-cycle benefits and the performance benefits. The proposed variety represent to us a diagnostic tool. Tracking areas within the company improvements are needed since those trigger adoptive change in the CRM software use. For instance, negative evaluation scores on the operational level may indicate that the enterprise should make an investment for the training of their employees on how to interact with software, so they could provide more reliable customer service and utilize the information more efficiently. In addition, the upper management level could possibly utilize the dimensional analysis to create effective marketing strategies and tactics.

## 2.7 Managing full customer cycle with a help of CRM software

Customer lifecycle management divided in such sub-processes as a customer acquisition, customer development and customer retention process. Therefore, general process should be possible to evaluate through the necessary KPIs (key performance indicators).

### 2.7.1 Customer Acquisition

New customer can be identified in two categories: new to the product category or new to the company. Customers who expressed new need or found better solution on already existing need are new to the product category type. An example would be the new packing operation need on warehouse, which became needed after the new project was approved. New to company customer mostly won from competition. Those customers will be switching from companies who offered less value and possibly missed many critical points in handling their services particular towards this customer. This of course depends on market structure within operational field. If the trend for new to category customer is high, it gives us information that market is not yet established and competition based on technology development.

In case if the market is established with the bigger companies, new to company won customers are the only way to create effective network. In addition, these customers can be expensive to acquire, in case if they are strongly committed to the current supplier. Two factors would indicate high expenses on the customer acquisition: a) strong and positive attitude towards the supplier; b) high levels of investment in the supplier;

New customers might be difficult to categorize for the markets where purchases done on the portfolio basis. This tend to work a lot more for the bigger companies and governmental organisations (public sector). The companies are getting a set of at least three alternatives. Depending on their needs (possibly: price, lead-time or warranty rules). For this customer even if he never bought from the supplier, or did that a long time ago, he will still remain as part of the supplier's portfolio. From the other side, the supplier can track not registered deals lately and automatically generate special offer.

The strategic switching may appear in case if the customers turns to another supplier in pursuit of a better deal. It might be a case of the successful marketing campaign from competitors.

In order to be efficient, the company should have a clear vision on the customers and the customer segments. It is fair to assume, that not all the opportunities have the same potential. The company should address following questions:

- Is it possible to create estimations on the value of the customer? Main attribute would be the margins generated from the purchases of customer.
- In case of a customer switching from the competitor, what share of category spending will the company receive approximately.
- What is an actual probability of the customer switching from its' current business partner / supplier.

The first estimations done in monetary form. Then it is percentage of product category and later on probability of switching. The last part is also difficult to calculate, since it relies on many factors. Jan Hofmeyr, in his research proposed Conversion Model, in order to assess probability of customer strategic switching. His work underlines how low commitment of customer as a main reason for undergoing the suppliers change. The commitment itself described as a function of satisfaction with organisation or their particular offer. Involvement, in turn, could be low if the offered product or implementation of it is not important for companies operations.

The level of customer commitment proposed by Hofmeyr proposes four major questions:

- How satisfied are you with (option)?
- Is this cooperation is something You take care of?
- Is there any other (option) that interests You?
- In case if yes, what is difference between the one (option) and another (option)?

Main idea for the CRM to process customer related data should be helpful for acquisition purposes, to create a steady input flow of the customer cycle. In comparison, poorly targeted efforts in an acquisition operations would waste the marketing funds.

### 2.7.2 Customer Retention and Development

Retention as phenomenon is maintenance of the trading relationships over the long period. It describes amount of customers doing business in the end of financial year, expressed from amount of customers in the beginning of financial year. So overall consistency of sales done or services provided to the customer.

However, yearly time lap might not be beneficial, so it is important to understand what organisational repurchase cycle is. In industry like telecom and IT those are calculated on a basis of equipment purchased and what additional developments could be made in the future (network expansion, processes rearrangement etc.); Possibly for this customer period of 4 years would be more sensible retention cycle, since by that period he would develop a need. The information on the repurchase cycle should be checked with the product managers and key account managers in order to create the detailed picture.

In terms of customer retention, it is crucial to understand source of the customer data. It can be separated into a three major groups or silos. The term of silos itself in IT perspective gives the description of information point in a system where the data is kept and segregated from the other parts of the architecture.

- Product silos describe the data, which revolves around the product. An example would be an insurance company. Their operations mostly concentrated around their product or insurance policy. In case if an insurance company assign new policy to the customer, it is marked as regained. However, it is possible that the customer would search for the other insurance options and after his insurance expired, he would return to the previous insurer.
- Channel silos related to the differences in data, where an internal and external data set is not adequate to reality. If the customer was buying products directly from the company, but after a year signs a contract with the partner who offers an additional service. Would this mean that this customer is lost if most of the execution (product) he still receive from the same company.
- Functional silos, in case if customer data is kept in these data points, means that system is not integrated to create the full overview of customer. Different units would treat this customer differently. He possibly did not bought any products for a while, but he still has an open quires and therefore sales and the customer service would have completely different info sets.

It is usual for the companies to create estimations on the retention rate based on an average numbers. However, the problem would appear here, since it is important to understand that the retention rate is highly dependent on what companies are taken

into the consideration. If the company loses 10 customers out of 100 in one year, pure retention rate is 10%; in reality effect of it on the business can be irreversible if a class „A“ customer would leave the partnership.

Therefore, the importance of a value in terms of retention is crucial. Company ensuring that the customer is generating value and focusing only on this are getting more time resource on the quality assuring. In case if the company is aiming to get all customers, although some of them could be value destroyers (costly to serve, strategic switcher companies) it would create the source of limitations and losses.

### **3 Research methods**

#### **3.1 Qualitative approach**

As a modern methodology of qualitative researcher is a diverse set of different components. Information obtained by processing rather linguistic than numerical data and empower meaning of information with a connection to different aspects of problem. Herby the statistical data is used less in following thesis as main pillars of expressed knowledge is coming from the field experts and people involved into process developments.

Described earlier phenomenon of the decreasing number of lost customers which can lead to the major profit growth of at least 25%, is claiming that these increase also can be up to 85%. From the statistical point of view (measuring rather in numbers) it is a non-sense due to the huge gap of difference of 60%. However, with the same information in a qualitative research we draw a conclusion, that this area is highly sensible for the operations of company and can bring new opportunities by improving the internal processes.

Qualitative approach also could be distinguished by following aspects:

- Attention towards phenomenon correct understanding with the respect of their own right (in difference with outside context);
- Open questions of a proposed research (versus direct hypothesis)

- Tools used in description are unlimited and depend on the nature of research (versus set of scale ratings and fixed selections)

To successfully research the proposed topic, the interpretivist qualitative research approach was implemented in thesis work. Reasoning is based on ability of social researcher (author) to create interaction among involved parties and play a role of facilitator of for understanding meaning of phenomenon.

### 3.2 Qualitative sampling strategy

As the main focus of research questions presented in Introduction part shifted towards internal sampling of data within Atea AS; In order to address more general question on the level of B2B organisations, another company Tvinex OÜ was sampled for data in order to draw comparison in overall CRM implementation and development strategy. Although, fields of operation for Atea AS (IT and Digital services provider) and Tvinex OÜ (Commercial Freight booking operations) are different, both companies are acting on Business – to Business model, were founded in the same period of time and use CRM systems in their operations on a daily basis.

Author decision for selecting companies of sampling was based on following facts:

- Both companies were established in late 2000s, meaning their presence on the market is over 10 years.
- Both organisations invest a lot of resources on automation of processes and implement constant system improvement for their customers, in order to achieve better customer satisfaction.
- Both companies are active both on domestic and international markets, giving better perspective on business strategies of sustainability of their operations.

Purposing the sampling approach was used by the author in order to select key personnel of each company who would be responsible for CRM development process and who would have access to the knowledge and experience of working with customer directly, meaning that the needs of customers are fully understood by these individuals.

## 4 Examining CRM system of Atea AS

### 4.1 Introduction of company profile and area of activities

#### 4.1.1 Company positioning on the market

Atea AS is a part of the bigger holding company acting on the Nordic and the Baltic markets of IT infrastructure solutions for business and public sector organizations. Activities of the organization focused on B2B model of interaction. The amount of workers employed in whole organization is 6900 people; around 58% of the staff is related to the consulting operations. Offices of organization are established in seven countries: Norway, Sweden, Denmark, Finland, Lithuania, Latvia and Estonia, overall amount of offices is 86.

Overall amount of the employees in Estonian office is more than 50 people. Yearly the turnover of company is 16 million Euro (data for 2015 financial year). Atea Estonia is a part of holding group represented on Norway stock-exchange market. This factor increases level of complexity in a planning and the project execution activities since the stakeholders are taking close look on every aspect of the performance results.

Atea is offering hardware and software of the world's top technology companies. Company is investing heavily on the certification and technical skills development of the employees in order to create the competitive edge.

#### 4.1.2 Fields of activities and organisational structure

Atea AS executing variety of the value added activities for customers: maintaining and administrating services, workplace equipment, safety and weak current systems development and maintenance, IT infrastructure development, e-commerce of IT related goods and customer electronics, official warranty service, rent services of IT equipment.

The main idea behind IT maintenance and administration services is insuring IT infrastructure and systems of customer to operate seamlessly and continuously. Specialists of Atea are playing role of service managers to perform efficient work streamline. Activities include:

- Network management. Insuring security and reliability of wireless and wired networks within the company operations routine. Such modern challenges as protection against the automated or targeted attacks could create negative impact on the entities infrastructure. This is especially important with integrated solution based on the existing IT infrastructure.
- Computer workplace management is essentially administration service of systems within companies. IT problems, accounts management, permission changes and daily routine of system administration. Through this solution, Atea is offering to outsource services of system maintenances.
- Systems and Servers Administration. Employees of Atea are certified specialists in the system management. Their extensive knowledge and experience is a key factor of successful operations. Specialists are competent in Microsoft or Linux-based database. This allows customer to receive optimized hardware and software operations. Maintenance of systems is possible in preventive or regular basis mode, depending on customers demand. Activities include software troubleshooting and implementation; log files analysis, backup systems development, antivirus and monitoring systems configuration.
- Implementation of IT solutions based on costumers demand. This ensures full cycle of operations in process of development, purchase, installation and implementation of particular solution.
- Atea applications management service incorporates company's IT operations and business software development into a unified entity. Helping customer new solutions to market faster, at lower cost and with minimum disruption.

Workplace equipment underlines all the hardware needed for daily operations of any type of customer. The idea is to understand conditions and needs of customer in hardware usage. Consulting and knowledge sharing is a focus of consulting within equipment selection process. Offering modern workplace devices, from classical desktop solutions to mobile workplace equipment. Main focuses in this value added activity:

- Selection of rational solutions within workplace equipment depending on needs assessment. Inquiries brought to the table and discussed with customers in details. Since consultants have access to different supplier's databases, they are also able to offer best deals on the current moment.

- Modern variety of devices needed for efficient operations is overwhelming. Offering full workstation solution includes not only desktop or laptop computer, but also second monitors, docking stations, printing and scanning devices, mobile phones. All this is possible to source from single channel for customer.
- Atea representing biggest software solution companies such as Microsoft on Estonian market. Dedicated specialists coordinate software selection process.

Safety and weak current systems development and maintenance is focused on installation, project development and maintenance of security, fire alarm systems, CCTV and access control systems. Installation of phone and television lines, computer networks. Dedicated personnel provide their knowledge in presentation equipment and remote control systems.

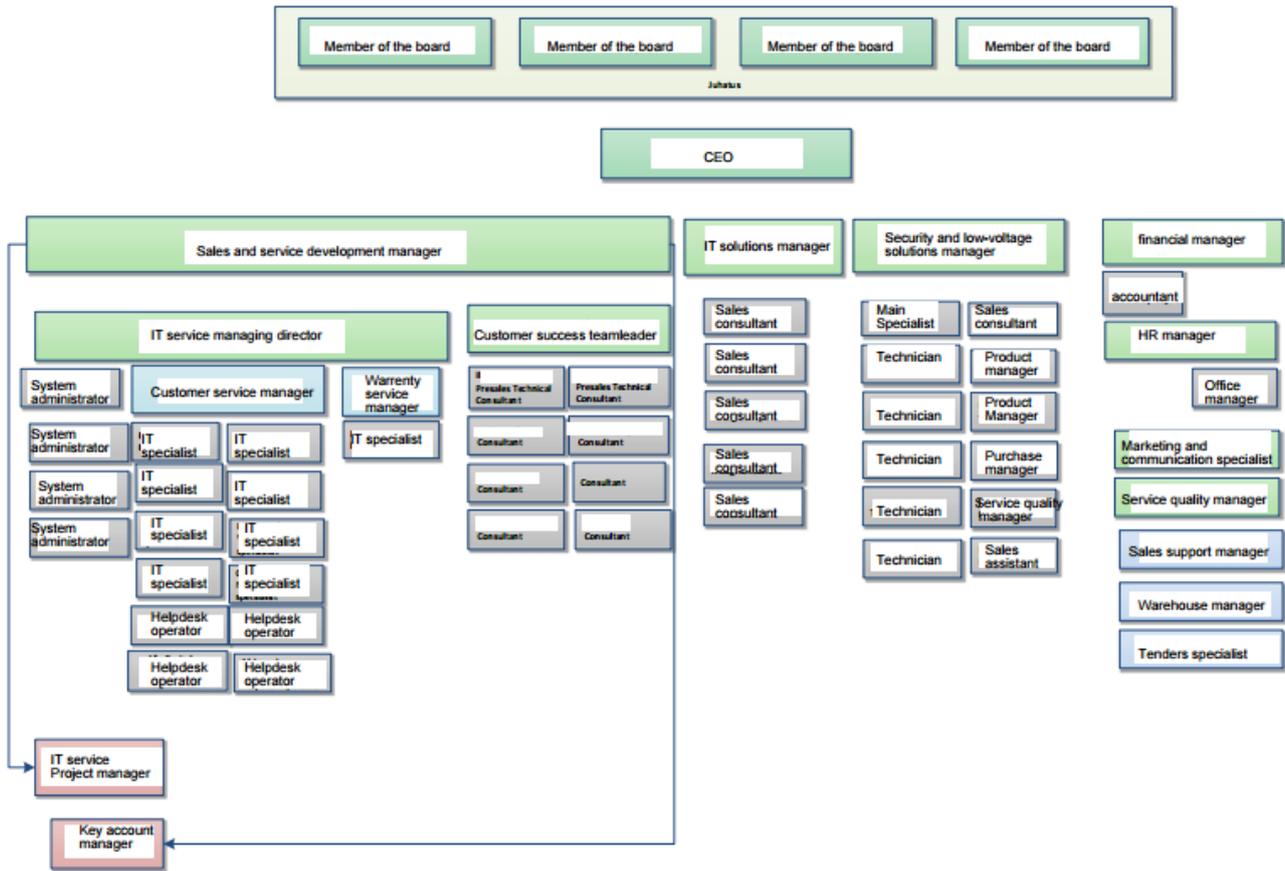
IT infrastructure development offered by company represented in different solutions e.g. design and development of wireless networks, software-based data centers, virtual and cloud systems.

Atea is established player of e-commerce. Offering simplified ordering process through e-shop. Variety of goods from 80 distributors and suppliers on Estonian digital market. Recently company updated their e-commerce webpage in order to create better user experience. Compared to previous version, new design brought additional features such as rating and commentary possibility for experience exchange among customers. Internal algorithms developed in order to understand customer's preferences.

Atea is offering lease on every type of hardware sold also one of the first on the Baltic Market who also offers software lease for organizations.

Atea is official warranty service provider for Lenovo ThinkPad and ThinkCentre computers. Also since the beginning of 2017 company started to complete warranty service for Dell and Getac computers.

Considering amount of diverse activities, internal communication is a key factor of successful cooperation within organization. However, this is where problems start to arise. The whole organization split into five teams referred to area of activities. Each team has its own goals, profile and internal role division. Structure of is represented on graph 1.



Graph 1 – Organizational Structure of Atea AS

Two main tools used in order to create synergy of company. Firstly, documentation and data processing through ERP system (Enterprise Resource Planning) by Microsoft Navision module for daily operations and document exchange among teams and customers. Secondly, system of Customer Relationship Management developed through Microsoft Dynamics 2013 and used in order to create unified sales and marketing processes pipeline.

CRM system utilized in Baltic region of Atea Corporation is Microsoft Dynamics CRM 2013 based on local installation located Vilnius, Lithuania. Atea Estonia connected to the service with remote system and all users have web-based access to the CRM system.

## 4.2 CRM system Microsoft Dynamics 2013

At its core CRM solution of Microsoft Dynamics is a dynamic database. However, compared to databases in traditional understanding it also includes built in tools, advanced filtration with specific logic related to sales and marketing processes.

CRM solution proposed by Microsoft is a part of established Dynamics suite. Main modules utilized in system are:

- Sales
- Customer service
- Marketing

Those modules will be described in the following chapters.

### 4.2.1 Sales module of CRM solution

Each module is dedicating to specific functionality. Sales module functionality includes leads, opportunities, commination tracking, Product database and overall sales process. Traditional sales management process represented in fig.1 and represent classical view of activity flow.

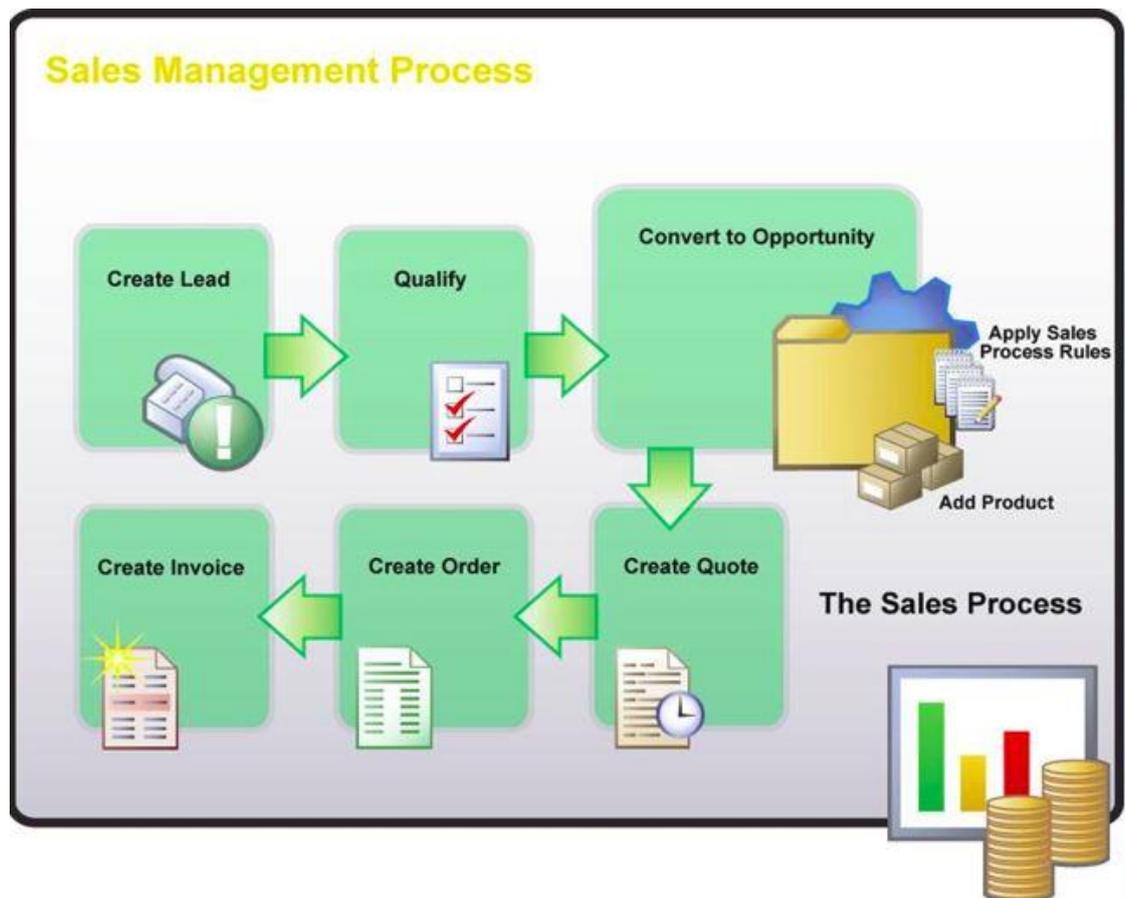


Figure 1 – Sales Management Process overview

Sales process in out of box solution is based on sales cycle example. Lead creation is essential incoming info for interaction process. Possibly, any kind of problem of customer wants to share with company and get their expertise. If lead is approved / qualified, it becomes opportunity. Resulting quote for services of companies. If customer agrees on proposed solution, operation is executed and order is created. After successful execution customer is invoiced for particular goods or services provided to him.

#### 4.2.2 Customer Service module of CRM solution

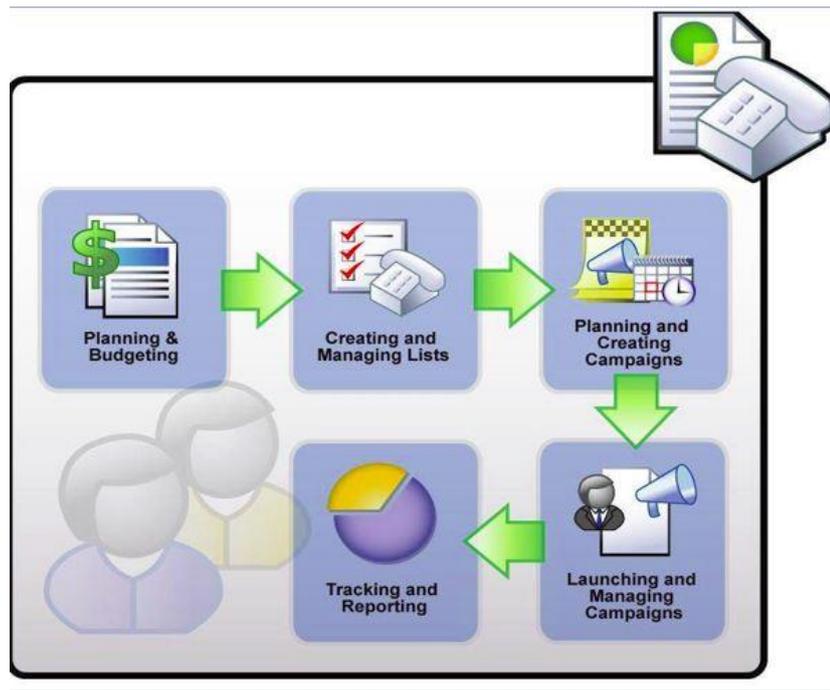
Customer service functionality represented by: Case Recording, Contract Management, Services and Resource Management, Appointment Scheduling and Knowledge Base.

Depending on internal operations of companies, some of the features are possible to dismiss. It is not realistic to expect handling of appointment scheduling in companies where sales managers are creating own decision on project development. They will be

doing their meeting scheduling based on their vision, rather than preplanned scheduling from support staff.

#### 4.2.3 Marketing module of CRM solution

Marketing functionality includes Planning and Budgeting, Marketing lists, Campaigns, Tracking and Reporting. Flow logic of marketing module represented by Fig 2.



*Figure 2 - Marketing process cycle*

Planning budgeting for marketing division is one of the main activities, since resources are key for marketing activity implementation. Budgets are done based on internal resources and cooperation with partner companies who are willing to support promotion of their goods or services through particular organization.

Marketing lists is created based on information presented by sales managers and customer service employees. It is done through filtering of the particular customer or assigning customers interested in specific product or service.

#### 4.2.4 Functionality of CRM system

Data base transactions are done on all levels of the CRM software solution. Essentially what the user gets is interconnected data stream, fully adjustable to the situation or case explored by worker. As an example sales manager who is using sales module is

able to create opportunities, using data bases of customers and contacts within the customer profile, information can be streamed to the description of opportunity.

In order to create the most efficiently implemented system customization work should be done. Variety in the process logic, customer approach and essential info about opportunities can be way different for companies acting on different fields of business. Therefore, customization as a process might be a challenging aspect, since it is not only technical question, but also strategical challenge to build truly useful and efficient system.

Navigation within the system itself is done through the upper tab. It allows to choose needed entities as per fig. 3 is shown main look on standard version of Microsoft Dynamics CRM 2013.

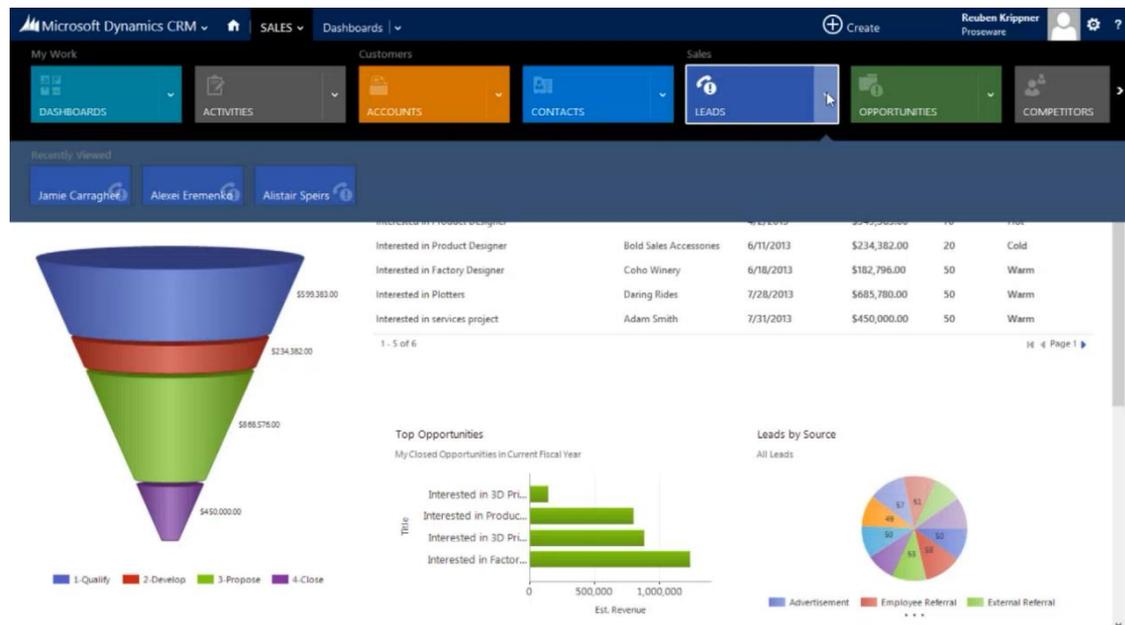


Figure 3 - default landing page of Microsoft Dynamics CRM 2013

Each module like sales or marketing has its own set of the entities that are possible to add or modify by the user. Each module has its own landing page where determined reports are available in a real time. Those landing pages are called dashboards and Microsoft offers variety of different layouts available for different roles within organization.

Example of Sales Activity Dashboard, allows user to observe status of open opportunities in the pipeline, progress toward goals, open leads and opportunities, the Sales Leaderboard, and related activities.

Workflow itself is playing central role in the CRM application. Software is giving more visual approach towards transactional record creation. Visualization of stages in linear way for business process flow also simplify defining stages of the process and fields to be filled in during particular stage. However, it will not perform any transactional operations and in reality works as “to-do” checkup as on example of fig. 4; it can be modified through inclusion of needed entities and taking out unnecessary ones for the workflow of organization.

The screenshot displays a project dashboard for 'CRM 2013 Upgrade'. At the top, it shows the project name, end date (29.11.2013), remaining budget (€16 000,00), and a project manager field. Below this is a horizontal progress bar with stages: Analysis (Active), Design, Development, Deployment, and Operation, followed by a 'Next Stage' button. Underneath the progress bar, a table lists tasks and their completion status:

Task	Status
Solution Overview	Completed
User Training Require:	Mark complete
Business Requirement:	Mark complete
Fit Gap Analysis	Mark complete
Development Environ:	Mark complete
Data Migration Requir:	Mark complete

Below the task list is a 'General' section with fields for Name (CRM 2013 Upgrade), Project Manager, Business Owner, Start Date (27.8.2013), and End Date (29.11.2013). To the right, there are tabs for 'POSTS', 'ACTIVITIES', and 'NOTES'. Under 'ACTIVITIES', there is a list of tasks, including 'Deploy demo environment in...' with a checkmark icon and a completion time of 9.2013 21:58.

Figure 4 - CRM 2013 sales pipeline process

Coming back to the available entities created within CRM databases, we can conclude transitional possibilities of system is high. All data input created for example within contact will be used in opportunity development and creation of leads within sales division.

Marketing counterpart is taking same string of the data from companies' entity in order to create campaigns, targeted on specific customers, who would be interested in this particular campaign.

## 5 The Study

### 5.1 Current process of CRM data collection

Employees of Atea AS are using CRM 2013 deployment in their daily activities. This information gathered through discussion with people dealing with CRM solution on a daily basis.

#### 5.1.1 Opportunities handling process

The most important part of information tracking are accounts and related information from previous history, contacts within accounts. This is particularly important to sales side of organization, when new opportunities are being completed.

All of the sales and marketing side employees are able to create new entities within CRM software solution. The number of required fields in creation of entity is quite low, therefore some important information about customer might be missing, just because person who did data input not placed this info into the system.

Currently, opportunity creation is a major aspect of company weekly meetings. Through this information, company is reflecting on current situation and possibilities for development.

#### 5.1.2 Customer information development

Data collection is done through each salesperson within organization, major data aspects could be gained from information registries of Estonia such as business register, where all companies registered in Estonia have their info published publically. Creation of customer card on the current state does not require active communication with potential customer and therefore all information given there does not bring additional value, rather than just copies available resource of information from web to the CRM system.

Contact creation is a sub entity by the logic of accounts creation (essentially card of company). Currently, the only obligatory field to be filled in in contacts creation is his surname. However, variety of fields is astonishing. Some of the fields are not bringing

any relevance, however they are still remain part of contact creation process. All generated contacts assigned to their account or company entity. However, since this field is not required in contacts creation, there is a chance that contact could be created with no company intact and become useless information string.

Accounts card is also providing great amount of data input fields. Data required to complete new input include Account name, Account registration number and Industry / Market segment. However, currently sales people can introduce address info, IT specific information (e.g. amounts of servers or computers in use). Also some of the less important aspects such as: contact preferences (by which mean of communication customer can be reached),

### 5.1.3 Customer knowledge development

There is no practical way to reflect customer knowledge, as there is no separate field for an additional comments in a free form. Currently, knowledge creation done either through opportunities tracking for the specific customer or email exchange tracking trough special additional module of CRM within Microsoft Outlook.

Microsoft Outlook CRM extension is a great feature for more the efficient information exchange between the customer and the company as additional feature makes it possible to set automatic tracking for particular account. All tracked information will be located on the customer's card information, making possible to track down history of communication. This surely can be named as key for the costumer knowledge creation tool, however on the current stage not all the communication is being tracked by the sales people. This is seen from sampling random companies from general account list. Most of the time sales people would just go on answering customers by email without tracking conversation down. In reality preserved information, which is shared for everyone in CRM system could bring more understanding about customer.

Current the CRM system does not offer any kind of rating system within accounts making it difficult to position strategic relationships out of general amount of companies within database. This problem creates troubles, when one team is actively working with customer and sees potential of strategic cooperation, but when same customer goes to other team (e.g. IT solutions unit) they start communication from scratch and

possibly getting less attention from team would bring customer dissatisfaction. This situation shows that Atea AS currently do not have unified model of customer cycle.

#### 5.1.4 Sales process reflection

Essentially, based on current situation the CRM software of Atea serves as a common customer database with possibility to generate the opportunities related to specific customer and contact person within Customers Company. This is also problematic aspect, since opportunities created by the sales people occasionally not being followed up and the deal becomes abandoned.

In comparison to Atea AS, Lithuanian company Tvinex OÜ is operating in the field of International Forwarding business. Company cooperates with ferry operators, freight transport companies and cargo holders. Their booking system is the main service delivery tool. Since it is an essential database, every customer within the system has a special note attached to account. This is a free format text, which is generated by the sales person of the company. It includes all special information about the customer. This way both working tool and CRM are at the same place.

Therefore, Tvinex is able to use their web based booking system also as a CRM system, since the executed operation would still be the same service. Atea in comparison cannot simplify processes the same way, since the fields of activities varies a lot depending on team.

The main estimation factor within each opportunity gives range of deal probability from 20 point (customer expressed interest) to 100 points (contract is signed) is created in order to create realist forecasts on companies performance. In case if deals are not being updated or dates are not followed, outcome of forecast has a lot of fluctuation within it.

Problems also appear in tracking sales process as most of the time sales people would create proposals on their own and this information stays unshared within organization. Therefore, if some other team member would like to contact and give the proposal to a customer he will rarely find history of proposals customer has. The only option is to go through ERP system and check for the actual sales orders, to track down

what services and hardware was sold before. However, this is a time consuming process, which not add value to the activity.

Leads module within the CRM system utilized based on events of Atea mostly. Participation on seminars and events organized by Atea AS being tracked this way as well. However, the general idea is to create leads as targeted operations, which can later on become opportunity is utilized in smaller scale. Currently this process fully neglected and the sales people are creating sales opportunities directly.

Tool of activity based on automatic tracking within Microsoft Outlook CRM plugin. Both emails and calendar events possible to automatically attach to activities list within the CRM system. It is possible to address the account with whom this activity is connected trough „SET REGARDING“ option as per fig 5.



*Figure 5 - CRM tracking add-on*

The customer indexation system is not available within the CRM system. In this sense the ERP system and the CRM system are not connected to each other. Customer Number generated for internal use can be accessed manually trough ERP system. In case if employee needs to add a new account in CRM and generate customer code, he would first have to create an account in ERP system. This duplicates same information for account creation, the actual work is doubled as well.

## 5.2 Improving information sharing possibilities of current system

The interviewing process of Business process development manager and key accounts manager brought some of the aspects up. Based on idea of full customer cycle development and understanding of customer knowledge creation importance following improvement aspects were proposed.

### 5.2.1 Workflow view development

The biggest factor of successful CRM system is quality of data within it. Currently a lot of effort done from employee side to maintain proper data input. A lot of feedback received regarding structure of opportunities development process. In reality, functionality of workflow not used in company. Current flow reflected on fig. 6



Figure 6 - Analysis of sales pipeline

As the whole process is currently depended on each sales person, they are able to do it fast and with no need to organize it into particular pipeline. Most of the time activities would be done simultaneously to create more efficient time management.

In this case system of process pipeline could be rearranged into steps:

- Qualified
- Meeting Held
- Proposal Sent
- Terms accepted

*Qualified tab.* Since currently leads option is not used and opportunities created from real event happening to sales person. Qualify tab can be initial milestone where data needed to proceed. Comment section would unlock more flexibility in Contact and Account editing.

*Meeting held tab.* Meeting is important aspect, which is being imposed on sales people. Ideas of coming out of office and reaching customers is currently accepted by all management level. In order to create better understanding of opportunity free form text or meeting memo attached from Microsoft Outlook would create visibility.

*Proposal sent tab.* This ensures that sales person developed solution with pricing information and additional descriptions, tailored for customer. In case if integration with e-shop solution will be done, most of proposals can be linked to specific opportunity. Proposals can include information regarding vendor, details of offer as small summary and attached proposal.

*Terms accepted tab.* If customer approves proposal in this tab sales person can enter additional info or feedback. In addition, this is final step before closing deal as won opportunity. Terms accepted or negotiation started can be a good point of reflection on conclusion part of opportunity, information included here would address changes in proposal and final decision.

### 5.2.2 Information exchange tracking

CRM system should also implement idea of information sharing process. Of course, some of the processes discussed via email or phones, but idea of actual contact with customer should be prioritized. In addition, many possibilities are unlocked through additional feature of CRM Outlook where meetings memos are possible to edit right in the planned event in calendar and then track back to CRM.

It is important to introduce meeting memos structured format. Trough CRM add-on in Microsoft Outlook calendar every meeting request with notes in dedicated field shall be converted to CRM activity.

### 5.2.3 Customer card development

Rearrangements in customer cards should create better information flow within organization. A lot of space can be saved by rearranging fields. Most importantly additional feature of comments within customer card, where based on discussion with customer, sales person or key account manager can create better strategic overview of activities from customer's side. The problem of effective knowledge creation could

not be solved this way, but sales managers and accounts managers would have a prospect on future activities and plans of organization, endorsing once again importance of meetings with customers.

Many issues in forecasting related to late response on so-called rotten deals. Sometimes sales person will not update info even after specific period of opportunity close date. To eliminate this problem, possible to arrange automatic mailing after due date of opportunity is passed. This way salesperson will be notified and can easily make changes within opportunity development.

There is no information regarding purchases of customers done through e-commerce solution of company. This statistic is available in administrative function of internet shop, but this information would only be available for users with administrative rights. So it might be possible to observe possibility of automatic data input to CRM system in form of generated .xml datasheet file. The layout can give direct link to specific customer information such as amount of purchased items for a period of time.

Contract documentation is an important topic for organization. Separate servers are storing contract documentation. Therefore, in the best case scenario direct link to this documentation related to account would help staff. It is possible just to create tick-box on account card to notify that agreement is created for particular account.

Overall, whole section of IT information could be rearranged in more simplistic way. Current tab of IT information is reflected on Fig. 7

#### IT Information

No of IT employees	--	No of PCs	--	No of servers	--
<b>IT INFRASTRUCTURE</b>					
PC preferred brand	--	Networking & Security	--	Video conferencing	--
Server brand	--	End point security	--	Data base	--
Virtualisation	--	Mail server	--	ERP-accounting	*****
Management tools	--	VoIP	--	Document management	--

*Figure 7 - IT infrastructure tab in customer card*

General information as number of Employees, PCs and Servers can be modified to Areas of interest with multiple choose option. In addition, preferred brands with multiple choose should be located in upper part of accounts card. Ability to receive this information in a form of tags for each company would enable targeted campaigning straight

from information of sales people. Database filtered by specific brand would show all companies and organizations who would have potential interest in learning and hearing new information related to products or services. IT infrastructure tab would include only free form text where sales man can reflect companies' vision on their infrastructure.

Development of Atea Status tab would help to complete internal audit of customer. This tab should include tick box for agreement. Sales Person should know if company have any kind of agreement with particular customer. Tick box for Atea e-shop system access. This would help to see if this customer is purchasing from e-shop. Atea leasing status, in case if customer is buying or willing to buy their IT hardware in lease. Also strategic status of customer within company. It can also be tick box with option strategic. If particular box was checked, it would give additional signal to sales person to give their extra effort for cooperation with customer.

#### 5.2.4 Task tracking system

Possibility for tasking could be explored in more detailed manner. Since currently, tasking tool is absent and every salesperson developed its own way of handling tasks. If CRM system could introduce multitasking tracking related to work with customer it would create additional value as a tool. Since CRM is tracked through outlook, it is possible to create tasking system through activities module.

All these measures are mostly concentrated on User Interface change and simplification of data input. Since current level of detailed information is low, by simplifying interactions with software and optimizing process of data input company should receive more effective data to work with.

#### 5.2.5 News feed automation

Microsoft Dynamics CRM 2013 proposed system of commenting for followed people from your organization. This system should be utilized more in real time for users, although it is a challenge to create efficient feed within existing solution. If employees are able to follow situation around them, it would boost internal knowledge of customers.

Functionality of following accounts or opportunities can help tracking down customers with different needs. Assuming case where company is interested in development of their printing process to be more efficient and new laptops for workers. Outcomes of those activities company want to receive simultaneously. In order to proceed, two different product managers can update information simultaneously.

## 6 Conclusions

The communication process is a complex phenomenon to approach, since every human interaction is a fundamental data exchange. Taking into the scope of internal communication of the organization and communication with the customers, we narrow down to an interaction of the customers and the sellers. In order to create an efficient exchange of information with the customers and within the team proper tools and culture should be established first. The satisfaction of a customer is a key to the successful business, therefore knowing more about the customer's needs would bring more trust and dedication. This information is only received through the effective dialogue and only those who are able to create the discussion receive this information. Bringing this information „home“ for the whole company generates an effective customer knowledge to be developed later on in the processes.

Following Table 1. Summarizing all suggestions provided in chapter 5.2 of this thesis with implementation strategy proposed.

*Table 1 - Categorized action plan for proposed improvements*

Improvement topic	Short description	Priority	Responsible person	Time spawn
Workflow view development	Process of establishing interactive pipeline for better processes input	Medium	Sales and Services development manager	2-3 months
Information exchange tracking	CRM intuitive tracking system with notifications for sales person (by utilizing key words in outlook)	Medium	Sales team leader	Up to 6 months

Customer card development	Introducing new fields and approach in input of customer information towards strategic overview.	High	Key account manager	Following month
Task tracking system	More unified system of tasks in order to create better usability of CRM as a tool for sales people	Medium	Sales and Services development manager	Up to 6 months
News feed automation	Within new version of CRM, interactive follow up of current deals and opportunities from the company.	Low	Sales and Services development manager	Starting from next year

The CRM software solution utilized in Atea AS is a necessary tool for the internal sharing process. However, due to a number of reasons such as time resource management, culture, functionality, data input within the CRM system is only concentrated on the opportunities following. The strategic aspect is lost on an operative level.

Most of the suggestions introduced in research are based on efficient time management. For example, if the sales person knows about last purchases done by the customer directly he can better assume the needs or create a dialogue regarding potential developments.

Introducing the efficient pipeline for the sales operations would help to see the CRM software more as a tool, rather than a necessary obligation. Satisfying user interface in this case can help solving routine problems for the employees, where they don't evaluate the system as an inconvenient for use.

Arranging more efficient customer cards with more perspective on the strategic view of the customer, rather than the current state of the things in terms of e.g. hardware amount. The companies are willing to share their vision and find collaboration on improvement creation, but the sales process should be more proactive.

The more efficient collaboration with the team can be done on a basis of a common value and interest in processes within the organisation. Common feed within CRM

software solution with more simplified system of chats and task assigning, would help in internal communication issues.

## **7 Discussion**

General knowledge remains the focus for all companies on the market. Ability to filter the data about the customers with a help of already established practices gives the competitive edge to a company. In pursuit for the better solution than competition companies, implementation of the CRM systems to track interactions with the customers and keep record of information related. This creates a particular need on the market of software solutions related to CRM. Currently the biggest enterprise software companies such as SAP, Oracle and Microsoft develop their solution. Smaller companies such as Pipedrive create more user friendly solutions and gain their market share on this market.

Both simplicity and functionality is important factor in development of efficient CRM software. However, in reality, most companies are stuck with their initial decisions and later changes and updates are too challenging, since it would require the change process.

The communication internally is based on the interactions among employees, this creates question of the equal information sharing process for all of the departments. If company consider itself as entity and acts on behalf of it, it is important to keep track of internal communication status.

To ensure that any kind of changes within the system are effective, feedback should be received to establish a culture of continues improvement within organization. In addition, there is a quest for Identifying the training needs for a team both in technical aspects of CRM system usage and in overall understanding of processes. Currently it is done trough the occasional meetings of sales teams, but most of the focus on those meetings is put on the culture of documenting new opportunities in terms of the revenue estimations.

Communication process with the customers is done in specific style of every sales person. There would be a challenge to ensure that system is convenient for every person,

instead system should be good and simple enough to optimize time spend in CRM system for each sales person.

Importance of the changes within account development system are both satisfied on theoretical and practical views. It is viable to the research on available market solutions within CRM field. Not necessary to implement particular one, but to explore overall functionality of systems and understand what features are truly needed in operations of the users. Within the company this can be brought on the table among the leaders and later on reviewed by the questioners for all of the employees related to CRM system.

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