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# B2B sales guidelines and process description for an SME operating in the service sector

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**B2B sales guidelines and process description  
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The purpose of this Bachelor's thesis was to produce business to business (B2B) sales guidelines and a process description for a company that wishes to stay anonymous, and therefore will be referred to as Company X. The company wants to increase its sales orientation throughout the whole organization. One part of that is to describe the sales process. To support that the purpose is to provide information and guidelines about B2B sales and describe the practical process in a way that it can be used in company X's quality process manual.

The theoretical basis of the thesis covers the basics in sales and provides a step by step guide to a sales process. A survey was carried out to find out if the views of a buyer and a seller match in a sales process. In many ways the buyers' and sellers' views lined with each other. The main difference could be seen in preferred contacting methods, in which the buyers preferred more indirect methods such as email, and sellers preferred a more direct way of communicating such as face to face meetings. The results show that time is highly valued by the customers. The seller needs to be efficient and find innovative solutions to communicate with the customer in a way that is informative and effective in making the sale, but at the same time flexible and the least time consuming from the customer's point of view. This creates the need of fluently combining multiple methods of contacting to ensure customer satisfaction.

The thesis was conducted in cooperation with Company X throughout the thesis. The questions in the survey were formed with and approved by Company X. The results of the survey were presented to one of the managers of Company X and the thesis will be delivered to the company.

Keywords: B2B sales, sales process, business to business, company guidebook, process description

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## 1 Introduction

Internet has changed sales in many different ways over the years. A salesperson used to be the main source of information concerning a product or a service. Nowadays clients have access to the same information, that they were not able to gather during the time before the internet. The internet has made it possible to access product's and service's basic information, consumer experiences and other relevant information. During the time before the internet customer had to lean towards salesperson's word and professionalism. Nowadays customer is able to gather information widely and with ease about topics, which are personally valued such as manufacture process, ecological aspects or other preferred values. From seller's point of view the change of doing sales and digitalization means that the salesperson has to understand the sold product even more specifically and staying continually up to date about consumer's preferences and values. The change does not certainly need to be seen as a threat, it can be seen as a possibility as well. In addition to the fact that mapping customer needs is easier during the internet era also gathering leads and prospects has eased essentially.

The thesis is made for a service sector SME (Small and medium-sized enterprise), which prefers to stay anonymous, will be referred to as Company X. Company X operates in Helsinki metropolitan area in Finland. The company does not have a separate sales department and after implementing their first sales project a need for a general sales guide to support the sales was arisen. The target is to create a practical solution, which supports sales work and maintains whole personnel's sales orientation. The thesis is still carried out on a general level, since it allows the utilization of the thesis in changing situations.

The goal of the thesis is to form a clear picture of B2B sales as a whole and then go through till practical sales process. The research question of the thesis is "do the views of a buyer and a salesperson match in a sales process?".

### 1.1 Objectives

The thesis will focus on business to business (B2B) sales, covering the basic theory of B2B sales and sales process. It also observes the near future possibilities of marketing and sales and ends with a questionnaire survey that was executed to see if the views of a buyer and a seller match in a sales process. The authors have decided to exclude business to customers (B2C) sales because focusing on a smaller target the authors can provide more precise information about the thesis topic.

The purpose of the thesis is to form a clear picture of business to business (B2B) sales process. The thesis will be used as a guidebook by the target company that wishes to stay anonymous and therefore will be referred to as Company X. The thesis will conglomerate the most relevant information that forms the structures for efficient B2B sales. The idea is not to create new ways or solutions to do sales.

The thesis involves a quantitative questionnaire survey about the sales process; how do a salesperson and a buyer see the sales process and do the views of a salesperson and a buyer match or contradict with each other. The survey will clarify the present state of B2B sales and the sellers' understanding of customer needs. The survey has been designed to give a cursory overview of the topic. The questionnaire was planned brief (10 questions) and easy to answer to ensure many enough participants rather than a thorough qualitative research with just a few different points of views.

The thesis addresses CRM services as a whole and does not aim to advertise or value up any separate systems.

The thesis overviews possible changes in the near future B2B sales. As the main focus of the thesis is to provide company X with necessary information about B2B sales, the overview of the future changes has been planned thought provoking rather than a precise sentiment.

## 1.2 Key concepts

The key concepts of the thesis are customer understanding, B2B sales and sales process. Customer understanding plays the key role through the thesis and in sales in general. It was valued over the product or service in the survey. Business to business (B2B) selling has its own characteristics that will be addressed and opened in the second chapter of the thesis. Sales process can be understood in two ways. The third chapter of the thesis addresses it as an actual process including steps from the first contacting to the follow-up, but it can also mean the meeting itself.

## 2 B2B sales - concepts and legislation

“Sales work is a process where the seller creates value to the customer so that the customer is content, the relationship continues, and the company meets its goals.” (Bergström & Leppänen 2014, 5.5.)

To put it simply, the main reason for selling is to make a sale. Making a sale is a complex process involving many different techniques, principles and personal skills. According to Pareto Principle, 20% of the customers make up for 80% of the sales. Because of this key account management has become important for it allows the seller or the sales team to focus on only the few biggest clients. A modern salesperson also needs to have skills to manage customer

databases, utilize all technological and internet's possibilities. The sales force needs to focus long term and support marketing activities. In B2B sales the seller has a role of a consultant. The seller determines the customer's needs, finds possible problems and provides solutions for them. The customer might not recognise the need before the salesperson arouses awareness. (Jobber & Lancaster 2012, 3-10.)

To be a good salesperson you need to understand the customer journey. Firstly, as you cannot sell to an oblivious customer, he/she has to recognize the need. That need can be forced, planned or aroused. Forced means in example replacing a broken product, planned is in example utilizing a new CRM system and aroused is when the salesperson has to make the customer see and feel the need for the purchase. The buying process of a customer has six levels, as seen below. (Kurvinen & Seppä 2016, 131-134.)



Figure 1 Kurvinen & Seppä 2016 modified, page 134.

Google is the beginning of almost all B2B buying processes and the largest Finnish B2B buyer research DIVA stated that the most important tools for B2B buyers are search engines and websites. Understanding the customer journey is important to a company, as it helps with directing sales and marketing as well as personalizing content correctly through customer understanding. If you can not get through to your customer in his/her search for a solution, it will be very difficult to make the sale later. (Kurvinen & Seppä 2016, 129-138.)

To a lot of people selling has a negative ring to it, even though selling is involved in all of our lives almost as a daily basis and in many different ways and forms, either directly or indirectly. As there is many different buying situations, there is many different selling functions. (Jobber & Lancaster 2012, 4-5.) Below is a picture to give an idea of different seller personas.

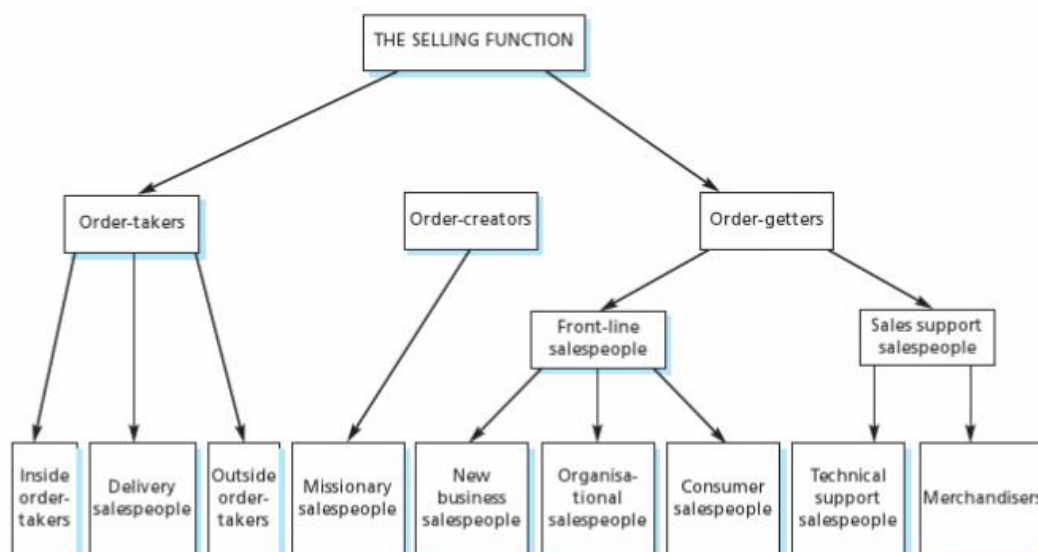


Figure 2 Jobber & Lancaster 2012, page 9.

Order-takers handle the existing customers. Order-creators do not directly deal with buyers, because they only talk to those who specify for example a medical representative to a doctor. Order-getters aim on getting new customers to place orders.

There are a lot of different ways of dividing selling. For instance, it can also be divided into two main categories: Field selling, which is when the seller approaches the customer or inside selling, where customer approaches the seller. (Bergström & Leppänen 2014, 5.5.)

Digitalisation is changing the world and “a constant change has become the new norm”. A seller has the possibility to reach a thousand buyers, but at the same time people want everything in an instant. For a company this can be a threat, but also a possibility. Selling needs to be adjustable, measurable, it needs to live up to customer expectations and it is not as distance dependant as it was before. (Kurvinen & Seppä 2016, 15-19.)

Companies spend large amounts of money on educating their sales personnel, because they are the closest and most important connection to the customer (Jobber & Lancaster 2012, 4-5). The important thing for a seller is to close the sale and make the customer willing to buy again from the same company. This is done by mapping the customers wants and needs, providing information about the most suitable product or service, offering additional information and guidance if necessary and making the customer see real value in the product or service. (Bergström & Leppänen 2014, 5.5.)

## 2.1 Differences between B2B and B2C selling

The basic principles of selling apply to both B2B (profit and non-profit organizations) and B2C (individuals), but there are some significant differences. In B2C the consumer is buying for



their own or their households use in three different categories: fast moving consumer goods that are habitual purchases that can be referred to as low-involvement products, semi durable consumer goods that are bought less frequently and take more time to choose and durable consumer goods that are high involvement products where the customer wants a lot of information and help purchasing. In B2B sales the main markets are for supplies and consumables, for capital equipment and for business services. (Jobber & Lancaster 2012, 11-12.)

The differences between B2B selling and B2C selling begin with demographic information. Though when selling to a business the buyer is still a person, you don't need to know the same things about them as you do of consumers, like the age or gender. (Tyler & Donovan 2016, 5). Still Bergström and Leppänen (2014, 3.3) state that some information can be related to an individual's demographic features, for example organisational goals, strategies and culture. The buyer for a company is usually a highly trained professional used to dealing with salespeople and therefore the seller needs to have all the necessary information and knowledge of the product or service and be able to answer even the hardest questions on set (Tyler & Donovan 2016, 5). The buyer for B2B is also more likely to negotiate on the price and the negotiations can take several months. B2B selling can require a sales team, involving missionary salespeople, who present the product to the customer and order-getters who close the sale. There can also be sales support and back office (assistants, consultants, technical support) and other professions involved. B2C on the other hand can in its simplest be very passive, like a grocery store cashier. (Bergström & Leppänen 2014, 3.3.)

From the seller's perspective there are a lot of differences between consumer and organisational buying habits. There are less potential buyers when selling to a business. In a lot of cases 10-15 companies make up to 80% of the output. When the number of customers is small, the emphasis is on long-term relationships and key account selling. The small number of customers can make organisational selling more complex and risky as the deals tend to be vastly larger. Organisations are also more calculative and rational in their buying habits and instead of just looking at the price, the lifeline and maintenance costs are taken into account, as well as tailoring possibilities. (Jobber & Lancaster 2012, 89-119.)

Jobber & Lancaster (2012) state that according to Fisher the organisational buying behaviour can be broken down to structure, process and content. The structure means the participants in the decision-making process. Rather than a single person, in organisations this usually is a team or a unit, who make these decisions. They are divided into initiators who begin the process, users of the actual product, deciders who have the decision-making authority, influencers who provide information and criteria, buyers who make the contracts and gatekeepers who control the information flow. The process depends on the exact buying situation, but the main characteristics are recognizing a need or a problem, determining its characteristics, specifications and the needed quantity, finding potential sources, analysing and evaluating

the proposals and suppliers, selecting the order routine and performance feedback and evaluation. The content means the criteria used by the buying team to make the decisions on different stages of the buying process. These criteria could be price, quality, risks, maintenance costs, office politics and in a case that the offers are basically similar, even personal liking or disliking the sales person. (Jobber & Lancaster 2012, 89-119.)

Even if organisations and consumers are mostly addressed separately, Bergström and Leppänen (2014, 3.3) bring up a fact the sellers should always remember. Even if you sell to a company, the buyer is still a human being. Much like consumers, the companies learn with time, change opinions and habits, care about the public opinions and have changes in their commitments.

## 2.2 Sales management

The key purpose of sales management is sales directing. That means educating and motivating the sales personnel as well as evaluating and advancing their performance. (Bergström & Leppänen 2014, 5.5.) It also includes planning (sales forecasting and budgeting), organising and controlling. It is important to have an idea of what the future will bring and to ensure that plans can be made in advance. A sales manager is usually the person to do the forecasting short-term up to three months ahead, medium-term for one year ahead and long-term periods of three years and more. The divide is done to cover all the viewpoints, such as tactical matters, business budgeting and long-term resource implications. (Jobber & Lancaster 2012, p. 15-16, 490-491.) This might also be done by marketing manager or marketing director (Bergström & Leppänen 2014, 5.5.)



Figure 3 Bergström & Leppänen 2014, modified 5.38.

### 2.3 Marketing communications

The goal in marketing communications is to sell profitably. The actual sales work is a part of it as is advertising, sales promotion and public relations. It is directed to all parties even possibly related to the company, including the company's personnel, investors, different medias, organisations, past to present and future customers, influencers and the big public. It is long term work aiming at making the company more trustworthy, known and interesting and more so compared to competitors. Marketing communications affect knowledge, feelings and actions. (Bergström & Leppänen 2014, 5.)

### 2.4 Measuring sales results

The purpose of evaluating and measuring sales results is to see if company or individual salespeople have met their objectives. This gives a possibility to take action if goals are not met, but also motivates the sales personnel as well as improves their skill set. From evaluating sales results a company gets necessary information about which products are being sold the most. If the sales team is neglecting a certain product line, the company can decide what can be done to prevent this in the future. Training, motivating and setting higher commission rates can all be used as a means to encourage the sales staff. This information can only be achieved by measuring sales results. The usual measurement of success for a single salesperson is the sales quota. For a sales team it is the sales budget, which will be used as "the standard against which actual performance will be evaluated". The information will be gathered through individual salespersons, field visits done by sales management and through customers via market research projects. In the end it will help determine a sales strategy. (Jobber & Lancaster 2012, 524-536.)

Kurvinen and Seppä (2014, 57-58) state that you get what you measure and what you measure, multiplies. But a company has to know what they need to be measuring as money is not always the best measurement, even though it is the wanted end result. For example, the company can find out if objectives are met by measuring growth and profitability, but the most important thing is to find the critical measurements for your company that helps actualize the strategy. The measuring has to be done as simply as possible through causation or it can burden the organization.

Sales control can be qualitative or quantitative and it is done by the manager or the employee to monitor the profitability of a sales person. Quantitative monitoring follows how many customer calls and offers the salesperson makes as well as his/hers costs and profits. Qualitative monitoring measures the whole outcome of sales and profit and in addition divides it into different sections like sales per customer, sales per product line, the ratio between sent offers and received orders and their value, number of new customers and the value of

sales to them, sales calls and costs. Kurvinen and Seppä (2014, 5.5) recommend using qualitative monitoring over quantitative, as it gives a more truthful picture of the quality and value of the sales when quantitative monitoring only tells results but not the ways they have been achieved or their long-term effects. The qualitative approach aims on finding ways to improve the salespersons skill set including product knowledge, work related attitudes and goals, planning, interpersonal skills and selling habits.

## 2.5 Laws and regulations

The laws and regulations in sales are meant to protect - and in best cases benefit - both the buyer and the seller, though consumer protection by the law is a fairly new (20th century) concept (Jobber & Lancaster 2012, 220). Different companies might operate under different laws depending on the line of business, so an employee should always get acquainted with the regulations and laws the company in question operates under (Kyläkallio 2013).

Ethical issues in sales include many different aspects. A salesperson should always be aware of their company's possible pre-set ethical guidelines, in case of bribery or other ethical issues. Some guidelines are determined by law and others might include environmental or societal norms - for example being truthful. Unethicality is not illegal in itself ergo an unethical practise can be perfectly legal and that is the reason businesses have widened their guidelines to wider moral principles. (Jobber & Lancaster 2012, 229-231.)

A contract is formed when a deal is made ergo when a seller agrees to part with a good or provide a service in exchange for a payment. When a deal is made and accepted by both parties the contract becomes legally binding. Not all contracts have to be in writing, but it is advised to place the offer and acceptance in writing to prevent misunderstandings and in case of legal issues to have proof. When making a sale often both the buyer and the seller have and are at liberty to state their terms and conditions which will be recorded and include order, delivery and return specifics. It is vital for a business to do this carefully as terms and conditions provide protection against claims. (Jobber & Lancaster 2012, 219-221; Kyläkallio 2013, 2.)

General data protection regulation (GDPR) is a new European regulation that will come into effect on 25th of May 2018. It will affect all register keepers, including countries outside of European Union, given that their registries hold information of European citizens. The registries mentioned include employee registers and all registers containing personal data including names, addresses, phone numbers or IP/email addresses and not just registers kept for marketing purposes. It will have an effect on B2B sales as well as private consumers. This new regulation will unify customs inside European union and increase transparency, allowing individuals to check, change and delete information from the registers. All register keepers need

to be able to prove that they are obeying the law and the new regulation. (Meling 2017, 5.4.2018.)

### 3 Sales process

B2B buyers are more aware and educated about their available options than ever before. The availability of online content and the growth of social media offers a huge amount of instantly accessible information. Customers are spending more time gathering and obtaining information from peers and other party sources. (Cernel 2016.)

Accenture research (State of B2B Procurement Study, 2014) reveals, that 94% of B2B buyers conduct some form of online research before purchase decision.

As a result, customers do not need personal engagement with a salesperson as much as before. Since the internet provides almost all the relevant information about the product or service, salesperson must act as a guide through the increasingly complex sales process. (Cernel 2016.)

The main key for success in customer satisfaction is high quality sales process. Sales process is based on agreed behaviours, which are followed by the whole personnel in a company. The main focus in sales process for successful salesperson is around comprehensive understanding of customer's needs. Whenever the customer's needs are fully understood, and they are fulfilled, there is no need to spend lots of time closing the deal. Properly implemented sales process naturally leads to closing the deal. (Rubanovitsch & Aalto 2013, 30-38.)

#### THE IMPORTANCE OF FORMAL SALES STRUCTURES



Figure 4 (Martin 2015)

According to a research published on Harvard Business Review (Martin, 2015) "Fifty percent of study participants from high-performing sales organizations responded they had sales processes that were closely monitored, strictly enforced or automated compared to just 28%

from underperforming sales organizations. Forty-eight percent of the participants from underperforming sales organizations indicated they had non-existent or informal structured sales processes compared to only 29% from high performing sales organizations.”

### 3.1 Sales funnel and customer relationship management

The sales process represents the development of a lead and straightforwardly following one lead through the process. In reality, there are probably many leads in progress at the same time in a different situation. A sales funnel covers all the contacts and acts as a way to track all the potential customers through the sales process. Sales funnel provides information about the progress of each customer, the value of the opportunity associated with a customer, how many customers can be found at each step and even revenue forecasts for cash flow statements. (Davies, 2010)

Customer relationship management(CRM) provides all the activities, strategies and technologies, which helps a company to manage their interactions with their current and potential customers. CRM supports building a relationship with customers and which creates customer loyalty and customer retention. Through better customer loyalty and retention CRM is a management strategy leading to increased profitability. At its core, CRM covers huge amount of information about companies i.e. websites, social media, telephone numbers and calls, emails, various marketing materials etc. Maintaining CRM benefits companies of any size. (Kulpa, 2017.)

### 3.2 Potential customer's need identification

A salesperson is needed especially when competitors are offering similar products or services. Most likely the deal will be closed by a salesperson, who is able to explain and introduce the benefits of a product or service properly and at the same time providing the best service. If a salesperson introduces features, which are irrelevant or not properly understood by the customer, it will cause frustration and unattractiveness. Once customer has lost his/her interest to buy it is really hard for a salesperson to revive it. A salesperson might still have a chance to sell single product or service, but since the customer has lost his/her interest, selling in bigger scale is almost impossible. To avoid this happening salesperson must place himself in buyer's position and strive to solve customer's needs since the very first meeting in the best possible way. (Rubanovitsch & Aalto 2013, 37.)

To reveal customer's needs salesperson must ask 'open' rather than 'closed' questions. This type of stance is recommended to adopt early in the sales process. Through the open questions customer might share problems a salesperson would not understand to ask and consequently true needs are revealed. At the end of need identification process, it is always good to summarize the points and problems that the customer has brought up and confirm the mutual understanding. (Jobber & Lancaster 2012, 273-275.)

Successful salesperson spends a great part of sales process for building trust while average salesperson spends most of the time for closing the deal (Rubanovitsch & Aalto 2013, 39).

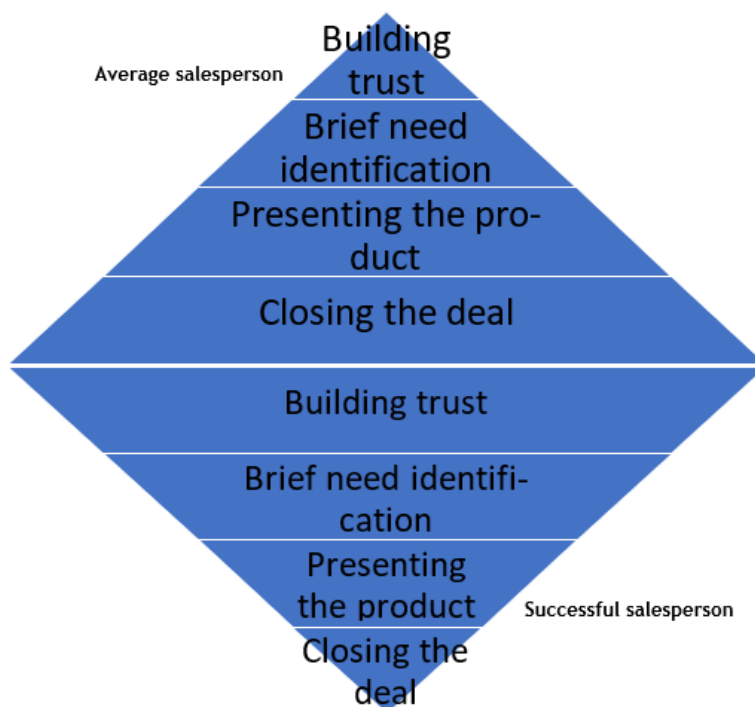


Figure 5 Rubanovitsch & Aalto 2013, Myyntitaidot modified, page 39.

### 3.3 Contacting potential customer by phone

Successful sales process requires proper preparation. A well prepared salesperson is more confident and more likely to achieve accomplishments. Customer is as well more willing to listen to a well-prepared salesperson rather than a random caller. (Rubanovitsch & Aalto 2013, 42-45.)

Before the phone call unravel customer's basic information and figure out what are you going to say. Whenever calling, salesperson's message and voice are crucial. Salesperson can not affect the customer by his own physical appearance or essence, nor with the represented company's external appearance, unlike during a meeting. It is important to speak slow and clearly on the phone. While speaking remember to have pauses and give opportunity for the customer to speak whenever needed. (Rubanovitsch & Aalto 2013, 54-55.)

Salesperson should not strive for selling on phone. It is distinctly easier for a customer to refuse buying on the phone rather than during a live meeting. Prefer selling a meeting over the product. A salesperson has to be ready to explain why customer should agree for the meeting. (Rubanovitsch & Aalto 2013, 57-58.)

Every phone call has to have something, which is really tempting for third party. Rarely anybody wants to have a meeting only for social reasons. Salesperson must be able to rationalize what kind of concrete benefits the company can provide and ensure the customer, that it is really worth it to sacrifice some time for the meeting. If the customer does not feel so tempted to meet after the salesperson's sales pitch, the salesperson should lead the phone call to find out customer's current situation and identify the needs cursorily. (Rubanovitsch & Aalto 2013, 58.)

Salesperson can find new arguments through need identification and explain why potential customer should agree for a meeting. For example, “based on what you have told me, I have to offer several options to fulfil your needs. I could prepare few proposals and present how you could benefit from them. Shall we meet for example tomorrow or next week Wednesday at 2pm?” On phone offer two different times and let the customer choose the one which fits better. When offering two different times a salesperson is already expecting potential customer accepting the meeting. Before ending the phone call briefly summarize the identified needs and make sure nothing is left to be unnoticed. Finish the phone call with a clear “thank you for your time“. (Rubanovitsch & Aalto 2013, 58-59.)

If making an appointment fails, salesperson has to strive for conducting a new phone call. Salesperson can promise to sort out something that has been an issue for the customer or ask the customer to clarify a certain thing, which is needed before the next phone call. Even though a salesperson fails to make an appointment after need identification and mentioned “hooks“, a salesperson can not give up. Continue following the sales process and making phone calls. On phone sales work is a great support for a salesperson, who has face-to-face meetings with the potential customers. The gathered data of phone calls should be saved on CRM-system. (Rubanovitsch & Aalto 2013, 59-60.)

The passage of the phone call

1. Introduce yourself properly and explain why you called. Reveal the beforehand planned ”hook“.
2. Present the benefits of face-to-face meeting. Explain, why the other party should conduct the meeting with the salesperson.
3. Briefly explain the content of the meeting to the potential customer. Reveal the estimated length of the meeting and point out that during the meeting it is meant to identify the needs of the customer comprehensively.
4. Suggest two different appointment slots. Stay quiet. Make an appointment. Ask a couple of focused questions.



5. If you fail to make the appointment, continue the conversation according to the sales process.
6. End the phone call properly and politely. (Rubanovitsch & Aalto 2013, 60.)

When a potential customer is the one who is contacting the company, salesperson needs to pay close attention. In this case third party is expressing a real interest or activity towards the company and the company's product or service. The interest can be expressed through a phone call, an email, filling a questionnaire or a contact form, or for example during an expo. All kind of contacts should be concerned as a sales situation and pursuit to turn them into face-to-face meetings if possible. It is essential to react to these contacts quickly, professionally and sales orientated. A potential customer, who is waiting for an answer to his/hers question for days or weeks, is totally a free catch for competitors. (Rubanovitsch & Aalto 2013, 62.)

There are two things that can be done to check lead's background. First, try searching on Google with lead's name. If it seems hard to find the right person try searching with his/her email or phone number. Email address can be seen as an online thumbprint, it is always unique. Email address can be used on Facebook search as well and when a lead can be found on Facebook it might reveal really important information. If Google search is not enough there are also professional tools, which use big data to gather leads and information about their back-ground. Secondly, based on what kind of background information is gathered, couple talking points or insights should be written down. With the background research provided information it is possible to get closer to a personal level of talking. Make it clear that they gave the information to you. Through this you will already separate from the other cold callers. When the salesperson gets on a personal level, the lead is much more inclined to hear you out compared to basic "Hi, my name is X and I am calling from X. How are you?" (Smith 2016, 8.)

Before a phone call type down from two to four things you have found out about the lead to prove you have done your homework, leads always appreciate this. The best situations are whenever the lead is recently mentioned on the news or been on other public publication. But always call leads as soon as they come in. If this is the case, you have no time make a background check. Quick contact reaction is more important than gathering information about the customer. (Smith 2016, 8.)

A Harvard Business Review (Oldroyd, McElheran & Elkington, 2011) states, that "Firms that tried to contact potential customers within an hour of receiving a query were nearly seven times as likely to qualify the lead (which we defined as having a meaningful conversation with

a key decision maker) as those that tried to contact the customer even an hour later—and more than 60 times as likely as companies that waited 24 hours or longer.“

#### 3.4 Meeting potential customer

According to Gates S. (The Negotiation book 2011, 1) ”The amount of time people actually spend negotiating is very small in the context of their whole job and yet the consequences of their performance during negotiations will often distinguish how successful they are.”

Requirement for successful meeting is a good preparation. Salesperson needs to think what type of things the customer might value and which are the crucial factors, that have to be fulfilled so the agreement can be reached. Salesperson needs to be proactive towards the other party's negotiating strategy. Examine their co-operation history and find out what kind of co-operation has worked out before and what kind of has not. (Hänti, Kairisto-Mertanen & Kock, 121.)

When negotiating, your own ego will easily set your mindset for ”winning”, especially if there is competitive tendering. However, the pursuit to close the deal should not be considered as a competition; it should be seen as delivering the best value for the other party. Clarify other party's interests, priorities, options, deadlines and things or circumstances, which influence their decision making. The deal has to be seen the same way the other party sees it. (Gates 2011, 1.)

Regardless of closing the deal or not, in every case negotiator needs to attempt to arrange a new meeting. For example, the negotiator can arrange a new meeting with a new plan, with a new offering or with a contract. If the other party does not have a need for the product or service at the certain moment, the salesperson can contact them again after couple of months or after half a year and ask about their current situation. (Kortelainen & Kyrö 2015, 51.)

#### 3.5 Closing the deal

Even though a salesperson would provide really effective presentation, which would match with the other party's expectations, still an initiation to close the deal is often needed. The things the other party is doubting might not have anything to do with the sold product or service. They might want to think things over again or they can be curious of what the competitors are offering. If the sale will not be closed during the meeting, there is a risk losing the customer. As long as the salesperson is with the other party, the salesperson has the advantage over the competition. But it is important to understand that in some situations trying to force the sale is inappropriate. Sales cycles might be long and a salesperson who tries to close the sale too early can be found annoying. (Jobber & Lancaster 2012, 289-292.)

Right timing is playing a crucial part when closing the sale. It is important to pay attention when the other party is displaying increased interest or in the best case even an intention to purchase. The mentioned situations can be seen as buying signals and have to be taken care of accordingly. These other party's buying intentions can't be assumed to grow throughout the whole sales meeting. Increase and decrease in other party's interest can be expected during the meeting. E.g. When other party's needs and demands are being met by the salesperson, the purchase intentions are likely to rise. However, the other party might find a problem, or some doubts arise in their mind, which will decrease the interest and therefore the intention of purchase. The intention of a salesperson is to pursue recognizing the strong buying signal and take the sale closing action. (Jobber & Lancaster 2012, 289-292.)

### 3.6 Additional sales

Dave Donelson states in his book (2000, 14) "Current customers are your best source of new business. They know you, they know your product, they have demonstrated a willingness to purchase. What's more, you know them, you've learned about their needs, and you've invested a significant amount of time in the success of their business."

Current customers are also the cheapest. The whole sales process has been done already and all other necessary tasks have been dealt with. Strive for a lifelong partnership. Become such an important part of their business, that they rely on your product or service. Develop solutions for their needs before they even realize having one. (Donelson 2000, 14.)

Opportunities for additional sales can be divided into 3 different situations:

1. A salesperson is having a conversation with a potential customer and recognizes a hint of customer having a need, which has nothing to do with the product or service currently being sold. (Kortelainen & Kyrö 2015, 80.)
2. A salesperson can strive for selling the main product or service with additional sales when there is a logical link between the main and additional product or service. This might provide extra value for the customer or the customer can find it unnecessary. (Kortelainen & Kyrö 2015, 80.)
3. Third step can be seen as a customer-oriented situation. Originally sold product or service has created another need to be fulfilled. In this case providing extra solutions might be highly appreciated act by customer. (Kortelainen & Kyrö 2015, 80.)

It is important to stay alert, keep ears open and listen to the customer. It is beneficial for the salesperson to solve the customer's new occurred problems and try to fulfil the needs, which new problems have caused. The process also deepens the relationship between the customer and salesperson. (Kortelainen & Kyrö 2015, 80.)

### 3.7 Post sales follow-up

At first follow-up might not seem that crucial as it does not end up as immediate sales. However, closing new deals with an existing customer is usually seen as a hallmark of success. Since customer satisfaction is essential for the future deals with current customers, it is crucial to ensure, that there are no problems arisen. (Jobber & Lancaster 2012, 292.)

After closing a deal salesperson has to make sure all the agreed points are being taken care of. Also, the customer might experience so called “cognitive dissonance”. This is the result of making the buying decision and it can leave an unsure feeling for the buyer towards the agreement. Make sure that the customer is pleased with the agreement they made and their need is fulfilled. (Hänti, Kairisto-Mertanen & Kock 2016, 122.)

Constant loss of customers discloses that things are done wrong. In this case there is a risk that disappointed old customers will reveal the disappointment to other potential customers and eventually this negativity will multiply. This will lead to a bad reputation and difficulty of finding new customers. (Kortelainen & Kyrö 2015, 77-78.)

### 3.8 The future of sales

In near future selling is going to get even more fragmented between online and face-to-face selling. The customer can easily manoeuvre between the two, in a way that suits him/her at the time. Customers will be more conscious than before and as they know what they want and demand for it, they are more and more setting the pace of companies. Social media is going to play a big part in the sales process and the sales person needs to know how to use this to create a positive customer experience. Digital solutions enable virtual presence, and this allows a whole group of professionals to play a part in customer service. Sales will be done even more often by sales teams rather than individuals. A lot of sales will be transferred from brick and mortar stores to solely online and this will end the era for old fashioned sales as a profession. Sales people will need a deeper knowledge and selling will seep into other professions as well. Sales and marketing will become a united process and the needs and values of the customer will be met with precision by customizing, tailoring or even creating wanted the product/service. Big data will be used for creating digital strategies more efficiently. Voice recognition, virtual reality and artificial intelligence and internet of things (IoT) will revolutionize the industry, but how and to what extent remains to be seen. The sales personnel’s rewarding system will soon be outdated as in the future the whole team should be rewarded, not just the sales person. (Hänti, Kairisto-Mertanen & Kock 2016, 169-171.)

## 4 Survey

The authors of the thesis conducted a quantitative questionnaire survey answering research question “Do the views of a buyer and a salesperson match in a sales process?”.

Quantitative research answers questions “what” and “if” effectively as it focuses on measurable data that is frequencies, percentages, proportions and relationships. Through those it uncovers user quantities, trends, attitudes and behaviours. It does not however answer question “why” as it aims to be objective. The results need to have the ability be measured, quantified and evaluated through statistical analysis. Quantitative research does not shed light on motivations behind monitored behaviours but on trends inside study groups or data sets. The gaps in quantitative research can be filled with open-ended survey questions, interviews or focus groups. (Goertzen 2017, 12-13.)

#### 4.1 Research question

Customer insight or in other words knowing the needs of your customer, is important in securing a successful sales process. Need identification is a part of it, but in addition to finding the right product or service the sales process has to leave the customer with a feeling that his/her needs were met. (Rubanovitsch & Aalto, 2013). Research question “Do the views of a buyer and a salesperson match in a sales process?” sheds light to the state of customer understanding today and its possible contradictions.

The questionnaire survey consists of ten questions divided into five subtitles. The chosen subtitles are seller/buyer mapping (question 1), contacting (2,3,5,6), sales process (7), buying decision (4), data collecting for sales and marketing purposes and a free word of B2B-sales (8,9). Through the questions the authors strive to construct a clear picture of how well the views of a buyer and a seller match in a sales event.

The buyer/seller mapping is done at the beginning of the questionnaire survey and the results are then separated so the possible differences in opinions can be compared with each other.

A research “buyer versus salesperson expectations for an initial B2B sales meeting” by Kaski, Hautamäki, Pullins and Kock (2015) state that there are differences between the buyers and the sellers expectations for a sales event that lowers perceived value and customer satisfaction. The thesis’ questionnaire survey examines the same subject as the mentioned research and the questions have been formed to clarify the possible contradictions in the buyer-seller viewpoints concerning B2B sales.

#### 4.2 Research target group and practical execution

The target group for the questionnaire is the professionals of business to business sales from both ends of the sales process, including the buyers and the sellers. The thesis is written as a guidebook for a Company X who requested a research of the subject at hand. The questions in the survey have been revised and accepted by the Company X before publishing.

The questionnaire survey is quantitative to answer the research question clearly and reliably. The authors needed a larger spectrum of answers rather than extensive answers from a small group of professionals.

The questionnaire was carried out using google forms. The authors found it to be an easy to use and reliable platform for data gathering. Even though the questionnaire is quantitative the participants had an opportunity to write an additional answer in the “other” -section in questions 5, 8 and 9. In these questions the “other” -section will not be shown in the diagram.

The questionnaire was spread out via email to management teams and sales & marketing professionals of selected companies in many different industries. The email addresses were gathered through largestcompanies.fi -websites company register. The questionnaire was spread mainly to the biggest companies in the Finnish industry through sales revenue. In addition, the questionnaire was shared in entrepreneur and marketing groups and in Laurea University of Applied Sciences -group. The survey gathered 106 answers in total. Out of the participants 75 were sellers and 31 were buyers.

#### 4.3 Research integrity

The Finnish Advisory Board on Research Integrity (TENK), which is appointed by the Ministry of Education and Culture in Finland, sets nine (9) points for the responsible conduct of research (2012) which will be quoted directly and unchanged below:

“1. The research follows the principles that are endorsed by the research community, that is, integrity, meticulousness, and accuracy in conducting research, and in recording, presenting, and evaluating the research results.

2. The methods applied for data acquisition as well as for research and evaluation, conform to scientific criteria and are ethically sustainable. When publishing the research results, the results are communicated in an open and responsible fashion that is intrinsic to the dissemination of scientific knowledge.

3. The researcher takes due account of the work and achievements of other researchers by respecting their work, citing their publications appropriately, and by giving their achievements the credit and weight they deserve in carrying out the researcher’s own research and publishing its results.

4. The researcher complies with the standards set for scientific knowledge in planning and conducting the research, in reporting the research results and in recording the data obtained during the research.

5. The necessary research permits have been acquired and the preliminary ethical review that is required for certain fields of research has been conducted.
6. Before beginning the research or recruiting the researchers, all parties within the research project or team (the employer, the principal investigator, and the team members) agree on the researchers' rights, responsibilities, and obligations, principles concerning authorship, and questions concerning archiving and accessing the data. These agreements may be further specified during the course of the research.
7. Sources of financing, conflicts of interest or other commitments relevant to the conduct of research are announced to all members of the research project and reported when publishing the research results.
8. Researchers refrain from all research-related evaluation and decision-making situations, when there is reason to suspect a conflict of interest.
9. The research organisation adheres to good personnel and financial administration practices and takes into account the data protection legislation.

In addition, researchers also need to comply with the practices listed above when working as teachers or instructors, when applying for research positions or for research funding, as well as when functioning as experts in their field both inside and outside the research community.

Besides research activity, the principles of responsible conduct of research apply to teaching materials, written and spoken statements, evaluations, CVs and publication lists, as well as to societal interaction in both printed and electronic publication channels, including the social media." ([http://www.tenk.fi/sites/tenk.fi/files/HTK\\_ohje\\_2012.pdf](http://www.tenk.fi/sites/tenk.fi/files/HTK_ohje_2012.pdf), 25.4.2018.)

TENK (2012) also states that violations of the responsible conduct in research can be classified either into research misconduct or disregard for the responsible conduct of research and these violations can be done intentionally or through negligence. They might also in addition to violating the conduct, violate the law. These misconducts include fabrication, falsification, plagiarism and misappropriation. There are set guidelines that TENK follows, should any of these misconducts occur.

The authors have read and followed the guidelines for responsible conduct of research.

All the answers will be presented in rounded percentage with 1% accuracy. The seller-buyer comparison will be introduced from the seller's point of view.

Because the questionnaire was shared in social media and to a large group of people via email without the proper knowledge of all the recipients exact job descriptions the reliability of the

answers could have marginal aberrations. However, the authors will review the questionnaire with the presumption that the participants have been honest in their answers and professionals in their field, that is in some way connected to B2B sales. Other possible factors when viewing the reliability of the survey is if the questions have been composed and delimited successfully to make them specific enough in order to minimize the possibility of the respondents misunderstanding.

When viewing the participant division between buyers and sellers (31-75) the authors found a possibility that as the survey was named in translation “B2B-sales questionnaire” and originally in Finnish “B2B-myyntikysely”, the term B2B might not have been understood by all the buyers and the unclear terminology could have been the cause of the low reply rate.

#### 4.4 The structure of the questionnaire survey and author interpretation

The survey was conducted using Google forms as a platform. It consists of 10 multiple choice questions. In some questions the participants had the possibility to specify their answers. These answers will be reviewed as a whole as listing the individual answers does not bring any additional value. The survey was named B2B-sales questionnaire.

1. Do you act as a salesperson or a buyer in a sales process? If you act in both roles, choose the alternative which suits you better in B2B sales event and answer the following questions accordingly.

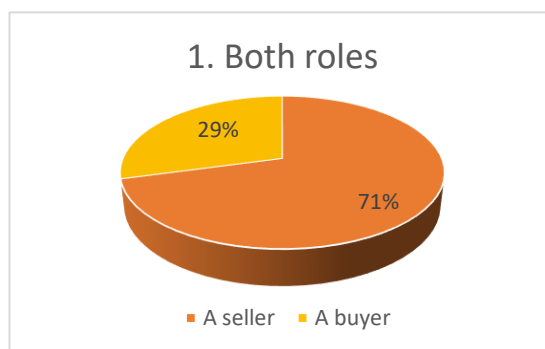


Table 1. Question 1.

The first question determines the seller-buyer ratio (71%-29%) and the answers have been divided accordingly to be reviewed separately.

Out of the 106 answers 29% were buyers. The results were surprising as authors expected to get more answers from the buyers than the sellers. After examining what could have caused the gap, the authors found that the questionnaire could have been named more clearly as B2B can be an unfamiliar concept to people who do not professionally work with B2B.



## 2. Which contact channels in sales interactions do you prefer?

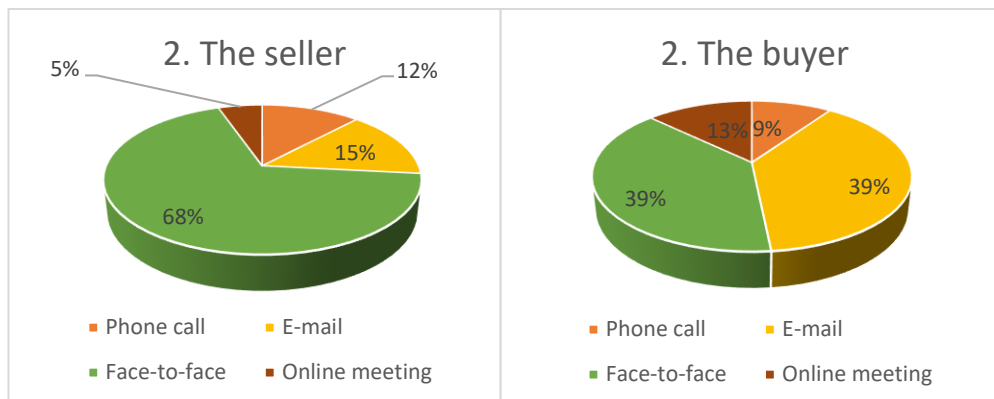


Table 2. Question 2.

The sellers most popular option is face-to-face meetings with 68% of answers. Online meeting is the least wanted way of contacting with 5% of the answers. Phone call covers 12% of the answers and e-mail 15% of the answers.

The two most favourite options for buyers are face-to-face and e-mail both with 39% of the answers. Phone call covers 9% and online meeting 13%.

The biggest differences between sellers and buyers are with face-to-face and email, with both participants filling most of the cake but dividing differently. The buyers select e-mail as the best form of contacting 24 percentage points (pp) more than the sellers. This means that the sellers find e-mail contacting 62% less preferable than the buyers. Face-to-face is chosen as the best form of contacting 29 pp more by the sellers than the buyers, which makes it 74% more preferable.

As the question is about sales contacting, it is surprising that face-to-face option is preferable to both parties. The authors expected it to get significantly less such answers. As face-to-face contacting means physically confronting all suspects it does not seem very time efficient. The authors suspect that the question has been answered through just what is the favourite (i.e. fairs etc.) rather than what method is best used day in day out. The biggest difference with buyer and seller is between face-to-face and e-mail and it can possibly be explained with the buyer preferring a method the least time consuming over the most efficient option, which will be the obvious choice for the seller.

3. Choose two options which have the biggest impact on cold calling (in addition to product or service)

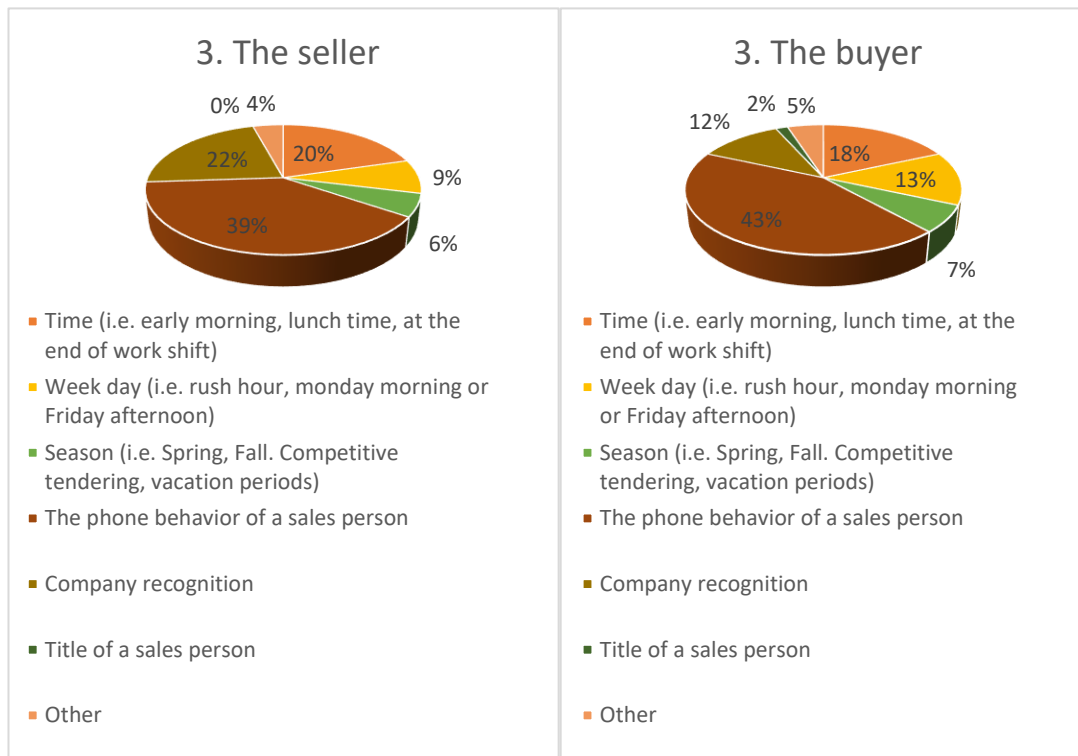


Table 3. Question 3.

The biggest impact on cold calling for sellers and buyers is the phone behaviour of a sales person. The title of a sales person is found the least important excluding the other section.

The “other” -section enforced the view that the phone behaviour of a sales person has the biggest impact on cold calling as most of the answers touch the subject.

Company recognition gathered 39% of the answers from the sellers and 43% from the buyers. Company recognition has the most notable difference between the two groups with a 10 pp less impact on the buyer. The sellers find company recognition 45% more important than the buyers.

The difference between the views of buyers and sellers in company recognition, which sellers find the second most important option in cold calling, could be just that sellers have a broader take on what affects a cold call. Time is chosen second among the buyers, which supports the overall results of the questionnaire that for the buyers' time is determining factor in most of the cases.

4. Choose two options which have the biggest impact on buying decision of a product or a service.

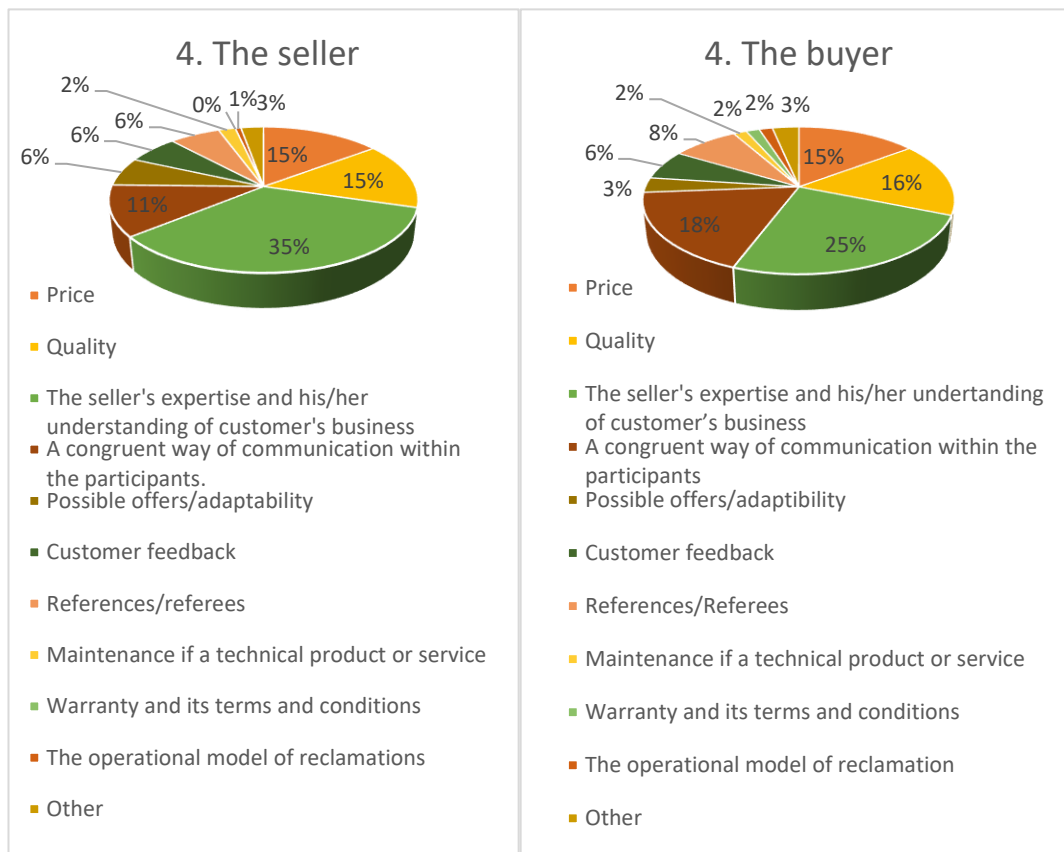


Table 4. Question 4.

The replies for this question were similar between the buyers and the sellers. The biggest differences can be found in the seller's expertise and his/her understanding of customer's business with 10pp difference. 35% of the sellers and 25% of the buyers chose this option. This means that the buyers are 29% less interested in the mentioned option. In a congruent way of communication within the participants there is a 7pp difference between the parties. This means that the buyers value a congruent way of communication 64% more than the sellers.

In "other"-section most of the answers touched the importance of the price and quality of the product or service. However, the findings were insignificant to the result.

The sellers attributes outweigh the price and quality of the product with both parties. The result endorses the significance of a qualified sales team.

5. Do you think cold calling is a good way of contacting? Explain your answer in "other"-section.

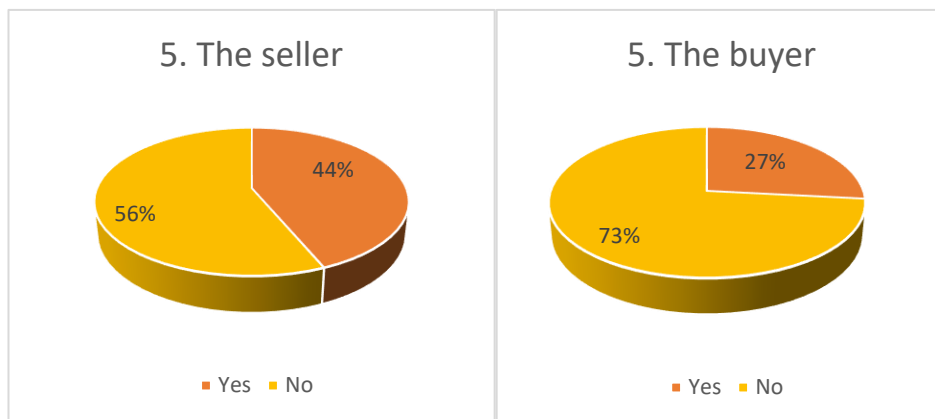


Table 5. Question 5.

Both groups had more negative outlook on cold calling but the buyer's attitude towards cold calling is more negative.

The "other" -section gathered 34 answers from the sellers and 16 answers from the buyers. Neither groups find cold calling an ideal way of contacting because it disturbs the customer and is time consuming for both sides. However, the sellers see it necessary even though not ideal. The buyers bring up that if there is a current need and the timing is right, the cold calling can be a good way of contacting.

The authors believe that the difference between the parties' results from the general attitude toward telemarketers. The buyers find it intrusive as do the sellers, but through their profession they understand the benefits of it. The authors believe that the results indicate that there could be a niche for a more efficient and liked contacting method.

6. Do you think E-mail is a good way of contacting?

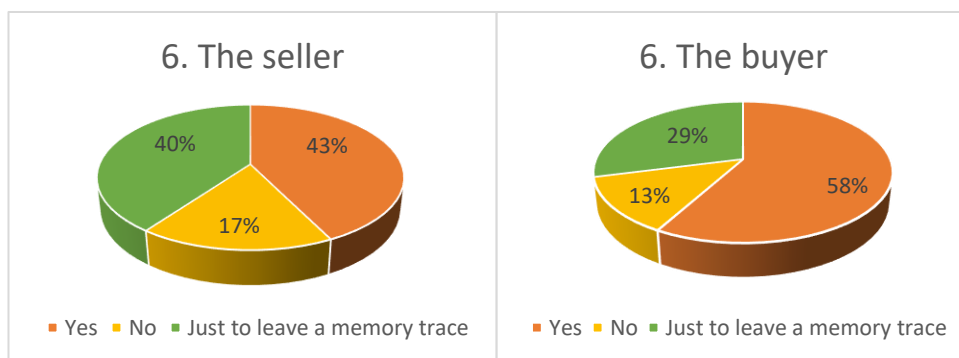


Table 6. Question 6.

Both parties have mainly positive outlook on e-mail contacting, but the sellers' opinions divide more equally between the two positive options. 15 pp of the buyers have answered yes, which means 35% more than the sellers. There can be seen 11 pp decrease between sellers and buyers, which means 28% of buyers find using e-mail only for leaving a memory trace less useful than the sellers.

The authors find it surprising that 17% of the sellers find e-mail usage not a good way of contacting as it is time efficient and customers find it more useful.

The answers support the overall conclusions of the survey. The buyers find the least time-consuming options most preferable as the sellers appreciate the most efficient forms of selling.

7. Choose two (2) options which you think have the biggest effect on the sales event.

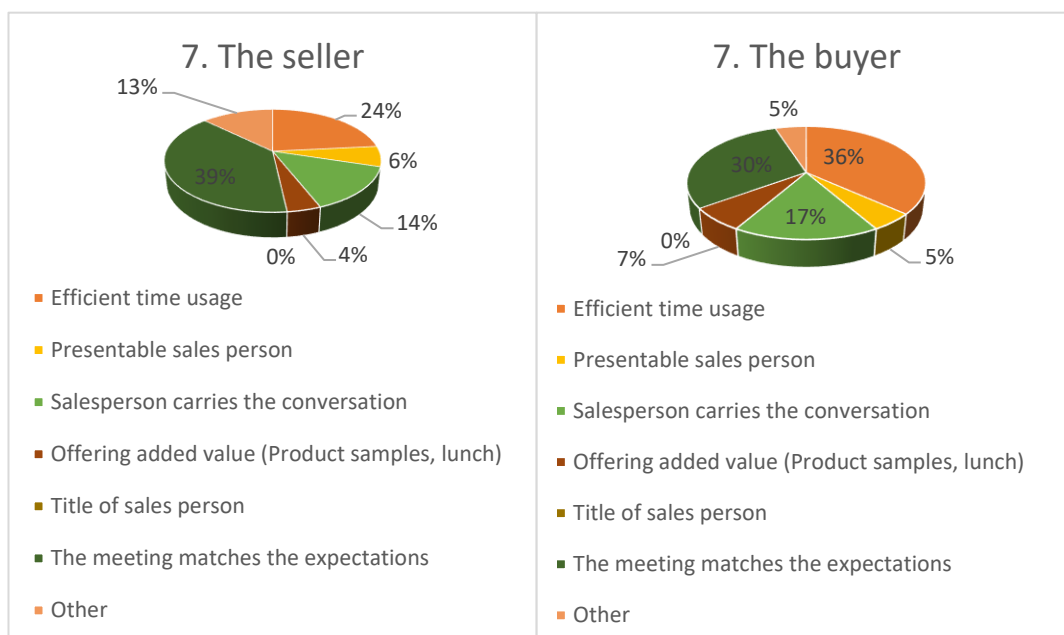


Table 7. Question 7.

The most popular options on both sides are “the meeting matches the expectations” and “efficient time usage”, the first mentioned being the most popular among the sellers and the latter among the buyers. Together they cover 63% on the seller's side and 66% on the buyer's side.

The “other” -section brings up the need for a trustworthy seller who listens and recognizes customer's needs.

The title of a sales person is not seen important with 0% answer rate. Presentable salesperson gained only 5% and 6% answer rate.

With 18 written answers from the sellers and three from the buyers, the overall consensus was a need for a trustworthy seller who listens and recognizes customer's needs. In the buyers answers again efficient time usage rises above all.

8. Do you find internet data collecting and utilizing it for sales and marketing reasons useful? Explain your answer.

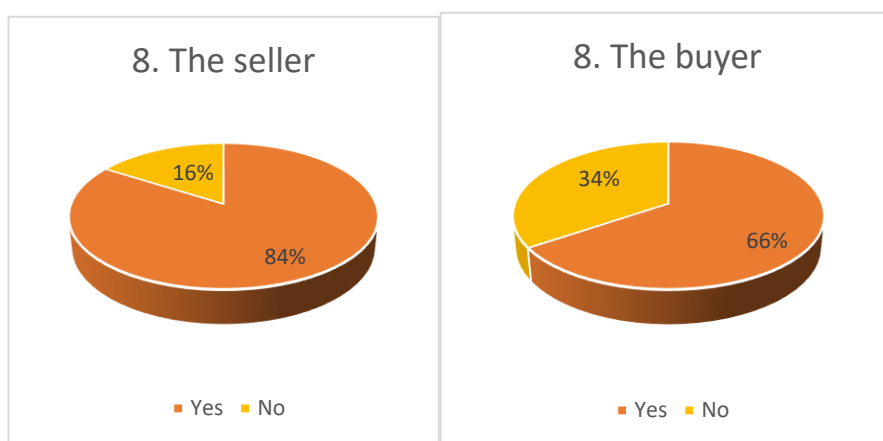


Table 8. Question 8.

The sellers have mostly positive outlook towards internet data collecting and utilizing it for sales and marketing reasons. The "other" -section gathered 23 explanative answers from the sellers and 15 explanative answers from the buyers. The answers support the results stating that it is a current way of gathering leads and strengthening the understanding of customer's needs. The negative answers suggested that the gathering and utilizing the data is still seen difficult or not yet well handled.

The positive feedback from the buyers came from getting more targeted campaign offers for their company because of data collecting and they understand the importance of it. The negative feedback addressed the lack of transparency.

9. Should data collecting on internet be more transparent? Explain your answer.

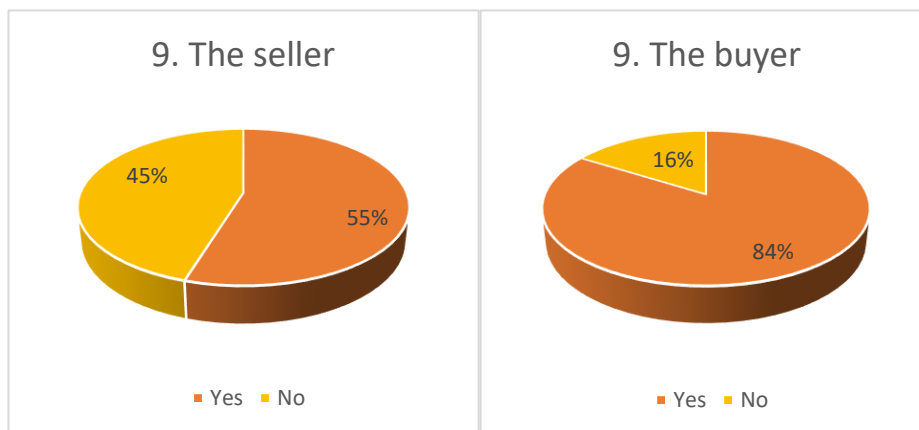


Table 9. Question 9.

In both parties the majority finds transparency in internet data collecting to be a positive direction. The question gathered 15 explanations from the sellers and 14 from the buyers. The buyers have a strong consensus that data collecting should be more transparent. A few mention GDPR, which will address the matter in May 2018. The sellers have more versatile and unsure opinions on the subject.

The unsureness of the sellers could be because they are operating in both ends of the subject. As a private person you don't want to be "spied on" but as a seller you need the information. The other thing is that the effects of the new legislation (GDPR) are probably not yet quite sure and that might preoccupy the sellers.

10. Would you like to add something concerning B2B-sales?

The tenth question got 34 answers. It was added so the participants would have a chance to comment or add something they felt was missing from the questionnaire. The answers spoke of the importance of customer understanding, professional sales person, follow-up and listening to your customer's needs.

#### 4.5 Conclusion

Out of the recipients 75 were sellers and 31 were buyers. The views of both recipients in general had a lot in common. The clearest differences in opinions can be seen in valuating different contacting methods. Buyers prefer undirect and less obligatory methods like email, when sellers prefer a more personal way of contacting, for example face-to-face meetings. The difference is likely caused by the fact that when a customer wants to choose a right moment for him/her to go through the offer and have an easy way out of the selling situation, the seller

favours a more personal level, where need identification and finding the right solutions for the customer's needs is easier, rather than the customer just declining the offer. In the actual sales meeting as well as through the whole process, the customers value efficient time use. The sellers did not take it into account as much as the authors feel they should have.

## 5 Summary

Selling is a complex process that can be viewed and analysed from many different aspects. The main intention however is always to make a sale and create value to the selling organization and the customer. Digitalization is changing the sales world and a seller needs to adapt to these changes, as they usually are the closest connection to the customer. In B2B selling the salesperson has to determine the customer's needs and find solution for them in a right time or it will be very difficult to make the sale later.

The typical features in B2B selling are a skilled buyer who knows the product or service well, long negotiations over price and contracts and large deals with one client. The selling is often done by a sales team instead of one person and the emphasis is on long-term relationships.

Selling is a part of marketing communications as is advertising, sales promotion and public relations. The sales personnel are supported and monitored by sales management, that educates, motivates and evaluates the sales personnel. The evaluation process is necessary to see if objectives are being met and it gives the company a possibility to react if not. Measuring the sales results should be done so that it gives a clear picture of the quality and value of the sales but so that the measuring itself doesn't strain the company and personnel.

Ethical issues, laws and regulations in sales are many and every seller should get acquainted with their employing company's guidelines. General data protection is a new regulation that will have an effect on all register keepers in the world, given they hold information of European citizens. The regulation will come into effect on 25th of May 2018.

The internet provides a huge amount of information and knowledge for customer's and this relatively new situation has changed the role of a salesperson. Salesperson does not act as a main source of information anymore, nowadays the salesperson's role is to guide customer through the sales process. The main key for success in customer satisfaction is high quality sales process. Basis for high quality sales process is creating trust with the customer through customer's need identification. A salesperson identifies customer's needs throughout the whole sales process since the first google search before first phone call till the follow-up.

To maintain and to keep the whole company up-to-date of each customer or potential customer the company is having, there should be a CRM system. CRM is a backbone for managing leads, prospects, current and old customers.



Sales process consists potential customer's need identification, contacting potential customer by phone, meeting the potential customer, closing the deal, additional sales and follow-up. Without proper CRM company's sales work is hard to maintain efficient and productive.

In the future selling will become more fragmented between different communication methods due to the possibilities the new digital solutions such as virtual presence will offer. Social media is going to play a bigger part in sales as well and a growing part of sales will be done solely online. Salespeople will need to flexibly manoeuvre between different forms of communication.

Authors' wanted to find out the possible differences in seller's and buyer's point of views in the sales process through the conducted survey. The survey was implemented on the internet as a quantitative questionnaire using Google Forms as a base. The survey gathered 106 answers and 36 of them wanted to hear about the results of the survey.

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