Revising Offer and Order Confirmation forms for Company X and Subsidiary Y

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ABSTRACT

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TIIVISTELMÄ

Tämä opinnäytetyö käsittelee tarjous- ja tilausvahvistelomakkeiden sisällön päivittämistä ja korjaamista. Opinnäytetyön tarkoituksena oli tuottaa luettelo suosituksista toimeksiantajan käytössä olevien lomakkeiden päivittämistä varten sekä tarkastella kyseisten muutosten hyötyjä toimeksiantajayritykselle. Koska opinnäytetyön toimeksiantaja yritys haluaa pysyä nimettömänä, siihen viitataan tässä työssä nimellä Company X ja yrityksen tytäryhtiöön nimellä Subsidiary Y.

Jotta tarjouksen ja tilausvahvisteen korjaamista ja päivittämistä tarvitsevat kohdat saataisiin tarkkaan selvitettyä, lomakkeita usein käyttäviä työntekijöitä haastateltiin. Kokonaiskuvan saamiseksi haastattelujen tulokset yhdistettiin teoriaan. Työn teoreettinen tausta käsitteli sopimus- ja tilausprosessia, sekä niiden yhteyttä myynnin tukimateriaaleihin, joihin tarjous ja tilausvahvisteet lukeutuvat. Näiden lisäksi tarkasteltiin myös asiakkuudenhallintajärjestelmiä.

Tehtyyn tutkimukseen perustuva laadittu lista muutoksista, korjauksista sekä muista muokkauksista tarjous ja tilausvahviste lomakkeille on tarkoitettu auttamaan Company X:ää kun kyseiset lomakkeet päivitetään. Lisäksi opinnäytetyö tuotti mallit päivitetyistä lomakkeista suositeltujen muutosten havainnollistamiseksi. Näiden lisäksi opinnäytetyön lopputulemana on keskusteltu tarjous ja tilausvahvisteiden päivittämisen hyödyistä toimeksiantajayritykselle.

Avainsanat tarjouslomake, tilausvahviste, myynnin tukimateriaalit

Sivut 45 sivua, joista liitteitä 5 sivua

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ABSTRACT

The purpose of this thesis project was to study the offer and order confirmation forms used by the commissioning company. The aim was to produce recommendations for revising the forms and determine how commissioning company will benefit from the revision work. As the commissioning company wishes to remain anonymous, it has been referred to as Company X and its' subsidiary as Subsidiary Y in this thesis.

In order to accomplish the given task, research on the topic was conducted. This included interviewing the company personnel that often use the forms in their work in order to determine the aspects in need of revision. The interview results were combined with the gathered theory in order to understand the requirements of such forms. The theoretical framework of this project consists of sales and contract making processes and their relationship to sales collateral materials such as offer and order confirmation forms. In addition to this customer relationship management and information technologies were researched and the theory utilized in order to better understand the mechanics of creating such forms.

As an end product, a list of recommendations for revising the forms and revised model forms for both the offer and the order confirmation were created. The list of recommendations includes points in need of revision, updating and content that would be recommendable to be removed or rephrased. The model forms and the list of recommendations are meant to help the commissioning company when they conduct the revision work. In addition to these the thesis was concluded with discussion on the benefits of the revision work for the commissioning company

Keywords offer form, order confirmation form, sales collateral material

Pages 45 pages including appendices 5 pages

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1 INTRODUCTION

This thesis was written for and commissioned by Company X. The purpose of this thesis was to create a list of recommendations for revising the offer and order confirmation forms for Company X. This was done through studying the importance of the forms in business and their role in interaction between the company and the customer. In addition, the employees of Company X that regularly work with these forms were interviewed.

The offer and order confirmation forms have been considered to be in need of revision as their applicability for the products of the Company X has been noted lacking. This is an issue as the forms are supposed to include all the important and necessary information that the customer will need of the product they have ordered or are thinking of buying. In addition to the revision of the information content in the forms, their other aspects were also reassessed.

1.1 Company introduction

The commissioning company is a Finnish medium sized enterprise that operates in the packaging industry. As the company wishes to remain anonymous it shall be referred to as Company X in this thesis. Similarly, the subsidiary of Company X shall be referred to as Subsidiary Y.

Company X originally started its operations in the first half of the 20th century under a different name than today. During its long history the company's experience and expertise of the field has grown remarkably. In recent years Company X has expanded their business by acquiring Subsidiary Y. Company X and Subsidiary Y operate in the same plant and use the same raw material, but the type of their end products are different from each other. The Company X produces packaging materials while Subsidiary Y can be counted as marketing materials. (Company X, 2016) Company X has the majority of its markets in Finland, where also the search for more potential customers has been aimed at. Company X and Subsidiary Y however also have customers and business partners in other countries. (Company X, 2018)

Company X and Subsidiary Y are run from the same plant and the sales personnel as well as the customer service representatives of both divisions work closely together. The systems and forms in use are largely the same. Offer and order confirmation forms, which are the focus of this thesis, are largely the same for both parts of the company, but the content of those forms does not match all of the products sold. (Company X, 2018)

1.2 Thesis problem, research question, and objective

The problem to which this thesis is aimed to provide an answer for, is as follows: The commissioning company, Company X, has noticed that their offer and order confirmation forms do not completely correspond with what is expected of them. The information content in both forms has been found lacking and somewhat misleading. As such, the focus of this thesis will be creating a list of recommendations for revising the offer and order confirmation forms that are used by Company X and Subsidiary Y.

In order to reach the desired goal, revised offer and order confirmation forms, the forms need to be studied and their applicability for both the Company X and Subsidiary Y has to be reassessed. This includes reviewing the information content and conducting research on the topic, so that recommendations for revising the forms can be made. At the heart of the research is the concern of the forms having been suggested by the company employees to be not only lacking and misleading in the information side, but also lacking in customer serviceability. To aid with the research and creation of recommendations for revising the forms in focus of this thesis a research question was defined. As the forms have been found to have qualities that may be or already have been harmful or less helpful to Company X and Division Y, the benefits of the revision of offer and order confirmation forms became one of the main points of this thesis work. Therefore the research question of this thesis was “How will revising the offer and sales confirmation forms benefit Company X and Subsidiary Y?”

The main objective of this thesis work was providing detailed information on the current situation and the desired situation with the aid of the research question. The end result was a list of recommendations for revising the forms as well as model forms for the company for visualizing the changes recommended.

1.3 Research method

In order to create a list of recommendations for revising the offer and order confirmation forms and answering the research question, research on the topic was conducted. The research was done through gathering information from various sources and using several research methods.

Qualitative research methods are research methods that do not necessarily provide measurable data. Instead they entail methods such as interviews and observations that provide more insightful and varying information on topics in question (Gerson 1993, 55). For this thesis, the research included observation and interviews. Interviews were conducted in order to get better insight on the topic and the problems the forms have created. Observations were done during the time the author spent in the company and observed the workings of the order process.

The literature regarding the thesis topic was gathered from various sources, both books and articles. The literature was used together with the information gathered from Company X and Subsidiary Y to create a theoretical background for the importance of offer and order confirmation forms as well as their purpose and usage. For this a theoretical background explaining sales and contract making processes and their relationship to sales collateral materials such as offer and order confirmation forms was studied. In addition to this customer relationship management and information technologies were researched and the theory utilized in order to better understand the mechanics of creating such forms.

Other information regarding the thesis topic was gathered as secondary data from the Company X and Subsidiary Y intranet. In addition to this, information was gathered directly from the company workers.

1.4 Case company

As mentioned before, the commissioning company wished to remain anonymous. Anonymity of the commissioning company has rendered several pieces of information confidential. Some of the information in this thesis was considered only for the eyes of the commissioning company and as such they have been removed from the final public version of this thesis.

Due to the confidentiality, details such as the real name and exact location of Company X and Subsidiary Y have been withheld from this work, and the products and their characteristics have been referred in vague terms. Similarly, in order to respect the commissioning company’s wish to remain anonymous the exact amount of sales personnel and customer service workers interviewed for the research has not been mentioned. Other omitted information include details such as the name of the ERP system and any and all detailed information on customers, prices and products that can be found in the ERP system.

Another important thing to notice is that the original material received from the commissioning company is in Finnish. Therefore all terms referring to the offer and order confirmation forms are not official translations used by the company, but instead translations of the said terms in to English. The translation work was done by the author and is not intended to be considered as the official translation.

2 THEORETICAL BACKGROUND

The benefits of revising the offer and order confirmation forms of Company X and Subsidiary Y cannot be properly covered without understanding the background of the problem. The offer and order confirmation forms play an integral part in the selling and ordering process as well as customer service in both Company X and Subsidiary Y. To understand the benefits of accurate content of the aforementioned forms and the part they play in a selling process, theoretical background of the issue was researched.

Several of the concerns that have arose regarding the forms stem from the concern of their capability of supporting customer service and the possibility of them not being up to task as representing the company to customers in a positive light nor communicating properly to the customers the information that they contain. The also forms play an important part in the contract making process and as such, they are required to be up to date in their contents.

The theoretical background for this thesis work was chosen so that it covers the aspects of sales work which the offer and sales confirmation forms touch. As the forms play an integral part in the sales work, theory of contract making process, customer relationship management and selling was researched. This was followed by research of sales collateral material, which the forms can be counted as being, and data visualisation. Another important point that was looked into had to do with the creation of the forms. As such, the theory behind Enterprise Resourcing Planning systems and Customer Relationship Management systems was researched.

2.1 Sales process

In its simplest, sales refers to selling a product to a consumer (Johnson, Kurtz & Scheuing 1994, 53). This however is not the entirety of it. According to Johnson, Kurtz and Scheuing in their book Sales Management: Concepts, Practices and Cases from 1994 a sales process is described to start with what is called Prospecting, followed by Preparing, Presenting, Handling objections, Closing and ending with Followup. In short, these stages can be described as follows:

Prospecting is a concept that includes identifying potential customers and potential prospect. Some of the identified potential prospects are the already existing customers, to whom more can be sold and former customers, with whom the customer relationship can be rekindled. On top of these there are other ways of finding new customers, such as a method known as cold calling. This means meeting and contacting potential customers without premade appointments and inquiries. This stage is closely related to the next step, Preparing. Preparing is the work done before sales negotiations. Research on possible customer needs and decision-making influencers is made on this stage. (Johnson, Kurtz & Scheuing 1994, 68-75.)

These two stages are followed by the third stage: Presenting. Presenting is where the sales and the contract are made. Contract making process and its' requirements are further explained in part 1.1.2 of this thesis. This is where the customer is convinced to buy the products of the company. The product and the company are represented by the salesperson and the customer decides whether to buy or not. This is followed by handling objections if any arise and closing, where, depending on how well the negotiations have gone, sales are made. (Johnson, Kurtz & Scheuing 1994, 87-95.) A lot about this depends on personal selling. The final stage according to Johnson, Kurtz and Scheuing is the Followup. This means the after sales actions of the salesperson and the maintaining of customer relationship.

2.1.1 Personal selling

As selling is their profession, a salesperson plays a major part in sales. They also hold a great importance in how the customer views the company, as a sales representative is often the one that a customer is first in contact with. In personal selling, the human element of selling becomes highly critical as the relationship between a seller and the buyer develops. In the end the sales representative becomes the company to the customer and anything that the salesperson dos, has an impact on how the company is viewed. (Johnson, Kurtz & Scheuing 1994, 5.)

These relationships between a seller and a buyer are a vital part of Customer Relationship Management, which will be explained more in detail later in this section of the thesis. However, a lot depends on how the salesperson represents the product and the company from the get go. If the customer feels that the product is misrepresented, or the promises that have been made are left unfulfilled they are unlikely to view the salesperson and the company in a positive light. This might even cause ending of the seller-buyer relationship. (Johnson, Kurtz & Scheuing 1994, 5.)

2.1.2 Customer acquisition

Customer acquisition is another way of looking into the process described by Johnson, Kurtz and Scheuing. Gaining new customers starts with finding and identifying consumers that would be likely to buy the products a salesperson is selling. When successful and a contract is made, a new customer has been acquired. This is what customer acquisition is at its simplest. (Galetto 2018.)

Customer acquisition can be a costly process and therefore its success is important (Galetto 2018). Customer acquisition takes a lot of resources. Most notable of these resources is time, as a lot of it is used by the salespeople into trying to forge a new relationship with a customer, this takes the salespeople away from their other duties as forging a lasting relationship with the customer can be a lengthy process (Roberts-Phelps 2001, 3). As time can be considered as one of the most precious resources a company has, using it inefficiently is something to be avoided (Mankins 2014).

2.1.3 Contract making process

As Company X and Subsidiary Y are operating in Finland, the Finnish laws bind them. According to Finnish law a contract is made when one party has made an offer and the other party has accepted it (Finlex 13.6.1929/228). A contract can be made in a written form or orally. The offer must be accepted in a defined time written on the written contract/offer or if the contract is made orally, immediately or in time which the response has been agreed to be given. If the offer is not accepted, a contract is not made. If the offer is accepted after the responding time has expired, the response is considered to be a new offer to the other party. If the accepting response contains a new amendment or a change to original terms, this is also considered a new offer. (Finlex 13.6.1929/228.)

When an offer is accepted, a contract is made. Contracts are binding agreements between parties. Once a contract is made neither party is allowed to change the terms of the contract without the consent of the other party (Kilpailu- ja kuluttajavirasto, 2014). According to Kilpailu- ja kuluttajavisrato, Finnish Competition and Consumer Authority in English, a contract must clearly state the following:

- The product or service being sold
- The price
- The duration of the contract (one-time purchase or fixed-term or ongoing contract)
- The delivery time and payment terms
- The consequences of breaches of contract
- Ways of amending the terms and conditions
- Ways of cancelling and terminating the contract

(Kilpailu- ja kuluttajavirasto, 2014)

2.2 Sales collateral material

Sales processes have traditionally been viewed as face-to-face transactions between a seller and a buyer. This however has changed with the development of technologies and emerging of sales collateral material as well as visualization of data.

Sales collateral, also sometimes referred to as marketing collateral (Kotler, Rackham, & Krishnaswamy 2006), means materials that support sales and marketing. This means information that customers gain from either printed copies of marketing and or sales material or from online sources (Saget 2006, 113). Sales collateral can also be referred to as data, fact or some other informational sheet (Saget 2006, 114). In case of Company X and Subsidiary Y, along with being integral parts of contract making process, offer and order confirmation forms fall in to the category of sales collateral.

The process of creating sales collateral may include several people and departments. The collateral is a representation of the company when a company representative, a sales person as an example, is not there to represent the company to the customer. Just like the personal selling, collateral material can also be used as a basis from which to build up relationship with the customers. If sales collateral material exists, it can be largely used as it is to several customers, which simplifies and makes the process more efficient. (Kotler, Rackham, & Krishnaswamy 2006.)

The people or department involved need to cover certain aspects. First aspect mentioned by Saget (2006, 115) is the development of the content, what the form or other collateral include as well as the concept of the content. Secondly, there is the design of how the collateral displays the content. Thirdly there is the aspect of language. This includes the way the information is worded and in which tone the company wishes to share the information to the customer. Lastly Saget (2006, 115) mentions the distribution of collateral material. Saget (2006, 115) gives sales personnel and marketeers as an example of possible distributors. In case of Company X and Subsidiary Y, it also includes the customer service personnel. One of the greatest benefits of well prepared and presented sales collateral is a positive image of the company that is displayed to the customers through it (Saget 2006, 115).

2.2.1 Visualisation of data

Data is often shown as numbers, pictures, shapes and colours. This is due to almost 90% of information processed by human brain being gained through our eyes. This is why data visualisation is important. It makes it easier for people to understand and absorb information. (Tietonäkyväksi 2016, 11.)

Information design means depicting information in the clearest way possible. This is mostly used to refer to improvement of visual outlook, but the term also includes structuring sentences and tables (Tietonäkyväksi 2016, 19). The golden rule of information design is choosing a presentation method that brings the clearest possible end result (Tietonäkyväksi 2016, 32).

2.3 Customer relationship management

Customer relationship management often referred to as CRM, and not to be confused with CRM systems, focuses on the importance of in which a company views its customers. In customer relationship management the term relationship is important (Buttle & Turnbull 2004, 31). Relationships are built from several concepts and one of the main ones is trust. Building trust needs investment on the relationship and that investment will pay off (Buttle & Turnbull 2004, 31). The two parties know of each other the less they are likely to doubt or perceive risks in making business with the other Buttle & Turnbull 2004, 31). If there is no trust between the two parties, they are less likely to have a lasting relationship (Buttle & Turnbull 2004, 31).

Customer relationship management, when utilized to the maximum, encompasses the entire organization (Roberts-Phelps 2001, 2). With well-executed CRM the entire organization views and treats the customer in a uniform manner and the customer will not be treated any worse by one department of the company than the other (Roberts-Phelps 2001, 56). Customer relationship management is also part of Followup in the sales process presented by Johnson, Kurtz and Scheuing in their book Sales Management: Concepts, Practices and Cases (1994).

An important part of the CRM is maintaining relationships with existing customers, so that those customers will do business with the company again, instead of the company having to be on constant lookout for new customers (Roberts-Phelps 2001, 1). If done correctly the interactions between the company and the customer become easy as they are both well versed in each other’s way of working. This is what sets the dealing with regular customers apart from new customers (Roberts-Phelps 2001, 3). Acquiring new customer can be a tedious task and convincing them to buy the company’s products may prove to be difficult (Roberts-Phelps 2001, 1).

2.3.1 Customer service and customer experience management

Customer service is a vital part of doing business. The failure of customer service leads to declining rate of customers and orders, which is something to be avoided if a company wishes to remain successful (Goodman 2009, 1).

Customer service is the part of the company that the customer is able to contact whenever they wish to know something or wish to inform the company of something. It has a large part in developing and utilizing CRM. Successful customer service is proactive and upholds the relationship between the customer by answering their questions and informing them of, as an example, any changes regarding their orders or any other questions and concerns they may have. It is also often up to the customer service to help the customer with their problems and in best cases solve them, keeping the customer happy and in some cases letting the customer know if the company is not capable of doing something and redirecting them to some other company. (Goodman 2009, 4.)

Customer experience management, sometimes referred to as CEM, is a form of customer relationship management that looks into the issue from the point-of-view of the customer (Schmitt 2007, 17). CEM is when customer's opinion becomes important. CRM focuses more on collecting the data and acting for the benefit of the company. CEM on the other hand takes a look into the other side of the coin. CEM help with creating a relationship between the customer and the company, the main point being how will the customer view the company, and why (Schmitt 2007, 18).

Upholding a good relationship with the customer makes doing business with them easier. A mutual trust that the other party will keep the other informed on any changes lets the parties to be more at ease with speaking to each other. This is vital, as otherwise he customer might not think their complaints on defects or the belated deliveries would be heard or reacted to. This could lead into customer not voicing their concerns and the company to be unable to act to fix the issue, as they might not be aware of it. (Goodman 2009, 17.)

Modern customer service has the benefit of information systems. These systems are used to gather and share data within a company, which allows a fast response time for any inquiries from a customer.

2.4 Information systems

Information systems are tools that focus on collecting and distributing data on wanted target groups or items. They can be used to support most of the functions in a company from sales to production (Sarngadharan & Minimol 2009, 7). In Company X and Subsidiary Y information systems are an integral part of work and functions. Company X and Subsidiary Y both use an Enterprise Resourcing Planning system and a Customer relationship Management system. However, Subsidiary Y is currently using also a secondary Enterprise Resourcing Planning system next to the main system in use in Company X.

2.4.1 Enterprise Resourcing Planning systems

ERP stands for Enterprise Resourcing Planning. ERP systems are information systems that are used to share information and integrate functions within a company (Moon 2007, 235). By utilizing an ERP system different divisions have the access to the same data (MYOB Team 2016).

For example, through utilizing an ERP system the customer service will know immediately whether the production planners have scheduled a replenishment batch for a stock item. Similarly the production planning will know what products have been ordered and are able to make a production schedule for the items. (Company X 2018.)

2.4.2 Customer relationship management systems

Customer relationship management systems, or CRM systems, often go hand in hand with ERP systems. ERP systems as mentioned before focus on data inside the business. CRM however is for the customer relation side of the business. When used together they create a solid foundation for efficient business management. (CRM switch, 2013.)

CRM is a compilation of practices, technologies and norms that the company applies. It started as a way to improve customer oriented business practices and has since developed with the availability of information technologies into systems that cover all customer based data and practices in businesses. (Bligh & Douglas 2004, 7-8.)

CRM systems are databases dedicated for information about the customer. They may entail the customer contact information as well as other information the company deems necessary to have. (CRM switch, 2013.)

3 ORDER PROCESS AT COMPANY X

The Offer and Order confirmation forms play an integral part in the order process at Company X and Subsidiary Y. For this reason, the order process of Company X and Subsidiary Y has been explained in this part. Furthermore, the requirements that the forms are obliged to entail are explained, followed by the current contents of the forms that are being used by the Company X and the Subsidiary Y. The offer and order confirmation forms in Company X are generated with the help of an ERP system. The ordering process of Company X and Subsidiary Y explained in this thesis is based on business flowcharts received from Company X.

3.1 From offer to order confirmation

Mirroring the sales process explained in the theoretical background of this thesis, the ordering process in Company X and Subsidiary Y starts from customer and company contact. The contact can be initiated by either the customer, who is interested in buying from Company X and/or from Subsidiary Y, or by sales representative of Company X and/or Subsidiary Y. (Company X, 2018.)

After the customer and the company have made contact, the offer preparation process starts in the company. There are few different ways the offer can be processed. The process starts with looking up the customer information from the main ERP- system the company uses. If the customer information does not exist yet, a new customer entry is made. A customer entry in the ERP system includes billing address, invoicing information, shipping address or addresses, taxation information, shipping information, delivery details, contact information of the customer and customer representative as well as a customer number generated for the customer by the ERP system. Same data will be used to open a customer entry into the CRM system in use at the company.

After that an entry called an estimate is made out of the product the customer will be offered. This includes the technical data of the product, the production line it will be produced in as well as pricing. After the estimate or estimates, depending on whether the customer is interested in one product or several, and the customer information exist, an offer can be made. The offer form is generated from the ERP system. After this, the customer receives an offer from the company, usually via e-mail in the case of Company X and Subsidiary Y. (Company X, 2018.)

If the customer accepts the offer, the customer can place an order. The order can be placed either through phone call, in which case an order form is filled by hand in Company X or Subsidiary Y or more commonly through e-mail. The E-mail can be sent directly to the customer service personnel or to a sales representative who forwards it to the customer service personnel. These orders are made by the customer and thus can be very different from the offer and order confirmation forms in use at the commissioning company. In any case the acceptance of an offer or placement of an order are considered to create a contract between the ordering party and Company X and/or Subsidiary Y.

In Company X customer service is where the orders are inserted to the ERP system. This entails going through the information on the order form and manually placing an order that corresponds the customer’s wishes. The order in the Company X ERP system communicates the order further to production planning. Once the order has been inserted to the system, an order confirmation is sent to the e-mail address of the customer representative that has been marked in the customer data in the ERP system.

In addition to this, in the case of new products the products need to be processed through the product designers. The same applies in cases where changes or adjustments need to be made to the existing products. If the product requires new tools to be manufactured, an order for those is placed. After the product designers have processed the product, the order for the product can be inserted to the system and an order confirmation is sent out as usual.

The order confirmation includes the technical data of the product, price, quantity and the delivery date. It also includes the delivery address and invoicing address. These are all examples of information that is required to create a binding contract.

3.1.1 The Subsidiary Y variation of the process

The process from offer to order confirmation in Subsidiary Y is mainly the same as in Company X, but there are some factors, which cause a variation. Such factors revolve around the complexity of products of Subsidiary Y as an example.

The products of Subsidiary Y are generally more complex in structure and the products are often sold as sets. Set-products mean products that require several different pieces to be manufacture to complete one usable product. Products of Subsidiary Y require many pieces and are more diverse and customable. They can be customised to suit the customers' needs and wishes. This is why creating an offer for products ordered from Subsidiary Y is more complicated that for Company X.

Another variation between Company X and Subsidiary Y comes from the difference in ERP systems. Company X acquired Subsidiary Y few years ago. The previous owner applied a different ERP system than Company X does. Even if the main ERP system of Company X is in use at Subsidiary Y the old ERP system is still sometimes used by Subsidiary Y when looking for older items, their pricing and designs. The old ERP system was well suited for the type of products produced by Subsidiary Y, transferring the data into the Company X ERP system is still in process and this is a part reason why creating an offer may take longer than for Company X products.

The old ERP system had a different offer form than the current one. The old form allows each item to be described in detail and easy customization of the items. This secondary ERP offer form looks different and the Subsidiary Y customer service has struggled at times to get all the information they would like to on the current ERP system offer form.
The company does not plan on using two different offer forms for long and is looking into terminating the use of the old ERP system form. This is a part reason for the need to revise the offer form as it has information content that does not correspond with products of Subsidiary Y.

3.2 Offer

An offer is an integral part of contract making process in business. An offer can serve as sales collateral in the role of a detailed package of information that urges the customer to buy the product. The most important role of an offer form is however its part in contract making process. Accepting the offer seals the contract; this is why it is required for offer forms to fill specific criteria. Such criteria is as mentioned earlier in the theoretical background: product information, pricing information, contract duration, delivery time and payment terms, amending the terms of contract as well as ways of contract termination. (Finlex 13.6.1929/228.)

Another list of criteria that must be filled by an offer form is presented by the Information Society Development Center also know as Tieke, full name Tietoyhteiskunnan Kehittämiskeksus in Finnish. The list matches the one in Finlex for the most part and one of the sources used for its creation is citied to be Finlex (Tieke, 2018).

The list of criteria according to Information Society Development Center is as follows:

- Date
- Header: the topic of the offer
- Address details of the parties
- Product information
- Packaging
- Price
- Possible ordering minimum/maximum and any volume discounts
- Payment and delivery terms (incoterms)
- Delivery time and method
- Offer expiring date
- Special notifications

(Tieke, 2018)

The difference between the two lists is that Tieke mentions delivery time as criteria for a proper offer.

As mentioned before, an offer is binding to the offering party from the moment the offer is delivered to the other party and the offer becomes a contract between the parties when the contents of the offer have been understood and accepted (Tieke, 2018 and Finlex 2018). This is why it is vitally important for the offer forms of Company X to be up to date. Accepted offer is a contract, and the terms stated in a contract must be followed and met by both parties. This is why an offer form has to meet the requirements to be considered valid and any inconsistencies that could be harmful to the company must be removed.

3.2.1 Contents of Company X Offer form

The offer form in use at company X meets clearly almost all of the set requirements. The topic is plainly stated as “Offer”, which leaves no room for confusion as to what the document is and every offer has a reference number marked at the top right corner. The form has date, addresses, as well as information on product(s), price, packaging information as a mention on pallets and their price, payment term, incoterm, offer expiring date and several special notes regarding tools and copyrights. Product information is depicted in columns with each column standing for different information.

Of the mentioned requirements the offer form lacks the estimated delivery time of the offered products. This could be considered as an addition to the already existing data content. However, information on delivery time on offer was not on the list of legal requirements by Finlex.

In addition to the aforementioned information that the form includes, there is also other content on the form. This information includes the name of the sales person who has made the offer as well as specific customer number used for the offer receiving party used in the company ERP system. Other information on the form are additional notes regarding the offer. Such information is the amount of value added tax, VAT for short, which in the case of sales between companies is 0%. This is followed by the expiring time of the offer in amount of days. This is followed by information regarding tool costs. These tool costs are announced as a specific calculation method for tool prices with an additional handling fee. There is also a mention of a specific type of tool that will be invoiced based on the realized costs. The next piece of information written on the form is information on pallets being invoiced separately.

The last note on the offer form has to do with copyrights. There is a disclaimer by Company X that states that the customer is responsible of copyrights to all third party material given to Company X by the customer. The very final sentence on the offer form is:

“We hope that our offer is suitable to You”

It is a polite sentence meant to speak to the customer on the behalf of the company. The Company X contact information follows this on fine print at the bottom of the form.

In addition to the aforementioned content on the offer form, additions can be made. Some employees make additions of, as an example, product specific information regarding palletizing on the form whilst creating the offer. This however is not mandatory.

3.2.2 Contents of Subsidiary Y Offer form

Subsidiary Y uses a different offer form than Company X. This is caused by the different ERP system that is still in use there. When making the offer a sales representative or customer service representative adds several details regarding each product and calculates the price of almost each part separately. This has been considered a necessity in Subsidiary Y as the products are marketing material and highly customizable, causing the dimensions and complexity of parts vary more than is usual with Company X products. This makes every offer slightly different.

Otherwise the offer form of Subsidiary Y is much like its counterpart in Company X, both have all the required information that make it a valid offer document. The biggest difference between the two is layout and the lack of some special notes that exists on the Company X form. Otherwise Subsidiary Y follows the same offer making protocol as Company X as well as the process from offer to order confirmation.

3.3 Order confirmation

After a customer has placed their order, a company is obliged to deliver an order confirmation, which includes information about the order (European Consumer Centre Finland, 2015). Just like a contract, the order confirmation must be in a format that cannot be altered by any of the parties after it has been created. Examples of such formats are a PDF-file (Portable Document Format) that can be supplied through e-mail and a letter (European Consumer Centre Finland, 2015).

In the case of selling goods, the order confirmation must fill certain requirements. It has to be delivered before the ordered goods are delivered to the customer at the latest, but preferably earlier (Kilpailu- ja kuluttajavirasto, 2014). The order confirmation must also include certain information, such being:

- Contact information of the company
- Product characteristics, ordered amount and cost
- Delivery details: delivery costs, time, address
- Order cancellation rights or the lack of them, as well as details of order cancelling process complete with goods returning delivery costs or the lack of them.
- Details for making customer complaints.
- In case telecommunications are used for contacting the company, existing call costs have to be stated

(Kilpailu- ja kuluttajavirasto, 2014)

3.3.1 Contents of Company X Order confirmation form

The orders of both Company X and Subsidiary Y are processed through the primary ERP system in use in the company. As described before, an order confirmation is sent to the customer via e-mail from the system once an order has been inserted to the system. Therefore the order confirmation form in use is the same for both Company X and Subsidiary Y.

By its visual appearance the form is two paged at minimum, but depending on the amount of ordered articles the page amount may rise. The last page of the order confirmation is dedicated for delivery details. Those include:

- Applicability: statement that the delivery terms stated concern Company X
- Closing the deal: Information on requirements for closing the deal. Statement of copyrights on all materials that were shared by Company X between the parties in case a deal is not completed during the period of the offer being viable. The length of offers viability is included.
- Responsibilities of the seller and the buyer respectively: delivery details, goods properties, invoicing and payment, damaged goods, consumer complaints etc.
- Collaborative agreement: both parties must do their best to ensure that the deal can be seen through by both parties
- Copyrights
- Dissolving the contract or changing it: information regarding rights for dissolving the contract and changing the terms

These delivery terms have been reviewed and honed recently and their revision is not in the focus of this thesis. Therefore they are not described with too much detail. Another reason for omitting details is the specific nature of the information that could break the confidentiality of the commissioning company. However, these delivery terms hold a section dedicated to the contract status of both the offer form and the order confirmation form. The delivery terms state in no uncertain terms that in offer-based procedure a contract is formed when the offer is accepted. In other cases a contract is formed when the seller has provided an order confirmation in written form. This solidifies the status that both forms have as a part of the contract making process.

The first page or pages, depending on whether the amount of ordered items requires another page, of an order confirmation in Company X and Subsidiary Y contain information that is more specific to the order. This information includes the information of the customer and details of the product or products. In addition to that the lower half of the first page has some additional information. This information includes for example the pallet pricing and the tool expenses.

The tool expenses include the price of certain type of tools required for making some of the products. Not all of the products sold require their own tools for production, but the prices are still included on the form. Information on how long the tools will be stored in the company after the last order has been made is also included on the order confirmation form. In the case of Company X this is a two-year period.

The order confirmation form also includes information on the delivery amounts. The production of Company X and Subsidiary Y products is done in batches. Batch production is not always exact and this is why

Company X and Subsidiary Y retain the right for delivering either 10% over, or 10% under the ordered amount. Invoicing will be done based on the actual delivered amount. This percentage amount will later in this thesis be referred to in the form it is presented on the order confirmation: +-10%.

Other delivery related terms on the order confirmation form refer to delays and defects. It is stated that the supplier is not responsible for any delays or defects that occur due to the delivery company, nor for any loss of time and/or profit that is caused by such delays. If defects that are noticed, a written account on it must be given to Company X and/or Subsidiary Y so it can be processed. Similar statements are made in the delivery terms on the backside of the form.

The last bit of the order confirmation form first page is a note on copyrights. The customer is responsible for the copyrights of material that comes from outside Company X and Subsidiary Y. This too is also mentioned in the delivery terms on the backside of the form. After the copyright part the bottom of the page has information on Company X. This includes the address, phone and fax numbers as well as the business identity code.

4 INTERVIEWING COMPANY X AND SUBSIDIARY Y EMPLOYEES

The main objective of this thesis work was providing detailed information on the current situation and the desired situation of the offer and order confirmation forms. With the revision of the forms as a goal, research on the topic was conducted. One of the main sources of information used in order to reach the said goal, were interviews conducted at the Company X and Subsidiary Y. The aim of these interviews was to broaden the understanding of the topic and answer the research question: “How will revising the sales offer and sales confirmation forms benefit Company X and Subsidiary Y”.

4.1 Interview as a research method

Interviews are a qualitative form of research. Interviews are a common research tool as they offer insight on the research topic through the opinions and views of people that are familiar with the topic (Bhamani Kajornboon 2005, 2). For this reason the employees of Company X and Subsidiary Y were interviewed on the topics of sales offer and order confirmation forms.

4.1.1 Conducting interviews at Company X and Division Y

The interviews were conducted at the company on weeks 14 and 15 in spring 2018. The focus group consisted of employees who work with offer and order confirmation forms on regular basis. This included the customer service workers and sales personnel. Each member of the focus group was interviewed separately on the matter of sales offer and order confirmation forms. Physical example copies of the forms were presented in the interviews, and during the interviews notes were made on the papers to visually point out the changes they would like to make.

During the interviews the focus group was asked questions on the topic. The questions were open-ended in order to allow room for the focus group to make their own observations and bring up their thoughts on the matter. The interviews were originally conducted in Finnish; the English translations of the questions were as follows:

1. Is there anything you would like to change about the forms? Why?
2. Is there anything you would like to add to the forms? Visually or content wise.
3. Is there any information that you find lacking from the forms? Why?
4. Is there any information you would take off the forms? Why?
5. Have customers asked you to specify some of the information after receiving sales offer or order confirmation form?

The questions chosen to focus on what sort of improvements the employees would want to be made on the forms. The interviews revealed many points of improvement and need for revision in the forms.

The interviews were successful and yielded much needed insight on the matter. Some points were focused on more than others. One example of such main points was the information content of the forms. The information content was carefully examined and many members of the sample group deemed the same content invalid and in some cases harmful for the sales work. Some information was considered poorly worded and some information was found lacking. The visual outlook of the forms was also mentioned by the focus group.

4.2 Interview results

The results of the interviews were various and both the offer and the order confirmation form were deemed insufficient to their task as they are in their current status. The results of the interviews influenced partially the selection of the theoretical background for this thesis work, such parts being the customer acquisition and personal selling. The results of the interviews are depicted in two separate parts, one for each form, respectively.

4.2.1 Offer forms

From the interviewed personnel especially the sales personnel examined the offer form of Company X thoroughly and several ideas for improvements arose. The content was found in need of revision and improvement. Customer service representatives of Subsidiary Y focused mostly on the differences between the two different forms and on how the form in use at Company X could be changed to fit the needs of Subsidiary Y products. Starting from the most discussed points the forms would need revision as explained in the following.

First point that most of the interviewees focused on was the texts and notes about tool expenses at the bottom of the form. This was also said to be the biggest problem of the form. These texts regarding the tools are default on every offer form, but have information that does not apply to every offer. The depicted tool expenses on the form have the names of the tools with set prices to the said tools that vary depending on the size of those tools needed. It is also written that other types of tools are to be billed according to the realized costs. These other type of tools are meant for a certain type of machinery at the production line of Company X. This was pointed out to be problematic by the sample group, as the customers who receive the offer might not understand the terminology associated with the tools. Many of the products sold in Company X do not require new tools, as there are many basic models that use the same tools. Only customer specifically designed products need new tools. According to the interviewed personnel, a customer might not understand this and might believe that there will be extra costs associated with ordering the product. This has led to confusion in the past and at times even to losing the sales. Moreover, these tool expenses do not apply to any of the products of Subsidiary Y. It was pointed out that in order for the Subsidiary Y to be able to start using the same offer form as Company X does with the best possible efficiency, text that does not apply to the products on the offer should not be there.

However, as the tool expenses are important in some cases, it was suggested that each product could have their specific tool expenses added as needed. According to the focus group together these changes would cur the inconsistencies in tool pricing information and the confusion of the customer. Instead the tool pricing would be clear and case specific.
Other ideas for the improvement of the form were more scattered. The form was pointed out to be impersonal. There are no start or end greetings.

In order to make the offer more appealing it was suggested that there could be a short phrase such as:

“Our offer to you is as follows” or “Here is what we offer” or simply: “Our offer” or such a starting greeting as a foreword before the actual offer. There is a short phrase at the end of the form that states:

“We hope that our offer is suitable to You”

In addition to this, an idea of adding a short greeting:

“Best regards, Company X”

As a signature to the offer form was presented.

However, the existing end greeting was pointed out to have a chance to be lost in the text concerning tool pricing and a disclaimer of copyrights for third party material provided by the customer being the responsibility of the customer. This is due to the fact that the phrase is situated as the last line of the text bulk and the pacing as well as the font makes it easy to miss.

Referring to the former, in regards to this wishes for improvements were aimed at the visual outlook of the form. One common point that the focus group had was in regards to the fonts used on the forms. There are two fonts, one used for the headers, which was considered clear and appealing and another for the filled in information which was judged to be difficult and trying to read. A revision of the fonts was highly sought after by the focus group. Adding to this, it was also suggested that bullet points for additional notes at the end of the form would make the text easier to separate and follow, which in turn according to the interviewees would make the text easier to read and understand.

Similar concerns arose over some of the phrasing of the contents. A phrase focusing on copyrights of third party material given to Company X and Subsidiary Y by the ordering party was considered to be in need of re-phrasing. Another point of rephrasing was changing the “reference number” to “offer number”. Other adjustment needs were suggested for placement of information. As an example the customer number gotten from the ERP system was suggested to be relocated above the customer name instead of the end of the same row where the customer name is. Similar tweaks that were suggested regarded the situating of the sales person’s name near the top of the form instead of the bottom where it is currently located. Referring to this one of the interviewed personnel summarized the need of offer form revision into one sentence:

“As simple and customer centric as possible”

Other issue, which was pointed out during the interviews, was the product data marked on the form. Same information can be marked down repeatedly, especially the measurements of the product. This was however admitted to be caused by the way the information is inserted in the ERP system.

In addition to the aforementioned, several specific additions that were considered important to be included on the forms, but that are at the moment lacking from it were mentioned. These additions include information on the pallet on which the products are delivered as well as the amount of product per pallet. The customers often ask these and some sales personnel add this information manually to the offers. It was also noted that while the form does have the measurements of the product mentioned it is lacking the unit of the said numbers. This wasn't considered a major issue, but the addition was considered useful. Contradicting to this, another small improvement suggestion was made regarding a column that exists solely for the unit marking "pieces" (pcs) according to the interviewed personnel; the offer could manage without mentioned column and rely solely on the number representing the amount of product in column "ordered amount".

Other addition was the consideration of bringing some information from the order confirmation for to the offer form as well. Of such information most important according to the focus group is the clause of actual delivery amount. On order confirmation it is mentioned that the delivered amount may vary -10% or +10% from the ordered amount.

On top of all this, in cases of Subsidiary Y offer forms it was suggested that offer form could have pictures of the products added pictures of the products added. This was considered to be beneficial as the products of Subsidiary Y can be complex and the customer could find it easier to understand the offered products with a visual aid. The added pictures or drawings were also suggested for Company X use. This could make the ordering process smoother and help with creating easier understanding between Subsidiary Y and the customer who receives the offer. This was further explored whilst interviewing another member of the focus group, and it was stated that if the form were to have a picture, it would have to be very small as the system might not be able to handle pictures of great size nor could big pictures be adjusted to the form easily.

4.2.2 Order confirmation form

The interview results regarding the order confirmation form had some of the same answers as the offer form. However, as the forms very different, several additional points that apply just to the order confirmation form were made. Nevertheless, the first issue pointed out from the order confirmation form was the same as with the offer form: the specifically depicted tool expenses.

The tool expenses are mentioned in more detail on the order confirmation form than on the offer form. Much as with the offer confirmation, this was considered to be an extremely dangerous flaw as concerned customers have contacted some of the sales personnel about the said tool expenses that do not necessarily even apply to their order. The tool expenses can be misleading and harmful to the customer relationship according to the interviewees. This is why they should be either removed completely or replaced with a more vague remark. Similarly any and all prices that are not relevant to the order should be removed from the order confirmation. This also includes the consideration of removing invoicing addition from the order confirmation form. According to the interviewed personnel it does not apply to majority of the customers, which makes it another misleading price on the form.

Important additions to the order confirmation that the interviewed personnel mentioned were not many. The order confirmation was considered to be more in need of revising the existing content instead of adding. However, it was suggested that adding specific information regarding in specific cases if need occurs would be helpful.

The idea of changes to the existing content and its revision however, was carefully examined by the focus group. Rephrasing of the additional texts was discussed as well as the way they are presented. Some information should be more easily noticeable. The clause of possible +/-10% delivery amount of ordered amount as well as a clause on how long the tools for the product will be stored by the company was considered such information. At the current status both clauses have a possibility to be lost in the flood of additional texts and notes the form has. This is why it was suggested that these two clauses could be written on a larger font or somehow be separated from the rest of the additional texts.

Many answers of the interview revolved around the additional texts. The text was considered relatively long and tedious to read. The text was described to be awkwardly situated on the form, as some of it is placed in a box and some of it not. It was also pointed out that the same visual problems that plague the offer form can be found on the order confirmation form: lack of bullet points, difficult font and information that bleeds over from its designated spot and mixes up with information under other headers. This issue was admitted to be caused by the way the data is inserted to the ERP system. Another issue with the additional notes is the fact that the form is two paged at the minimum. The second page, is as described earlier in this thesis, is reserved for delivery terms. These terms have a lot of the same information as the additional notes. Because of this it was suggested that the notes should be compared to the delivery terms and duplicate information be removed from the notes. This would shorten the notes, which in turn would help the relevant information on the first page of the order confirmation stand out.

4.2.3 Summarizing the results

In order to create a clear summary of the answers of the interview, a list of recommendations was created for both forms. The lists include content that should be added according to the interviewees; content that should be removed, as well as content that should be changed. In addition to this both the summary of interview results for both the offer form and the order confirmation form has and additional specific request regarding the form.

Summary of offer form interview results

To be added

- Foreword(s)/Greeting
- Bullet points for the additional texts
- Tool expenses as a separate mention for each item
- Amount/pallet information
- Pallet type information
- The measurement unit of the length, width and height
- Consider moving some information from order confirmation to the offer as well.
- +-10% clause about the actual delivered amount
- End greeting

To be changed

- Text font
- Overall visual improvement
- Reference number changed to Offer number
- Move the sales personnel information closer to the beginning of the form
- Customer number moved to above the customer details instead of the same line as the customer name
- Explanation changed to Technical information
- Consider rephrasing some of the additional texts
- Rephrase the tool cost clause

To be removed

- Any tool expenses that do not apply to all products
- Any numbers that might mislead or confuse the customer
- Consider removing the column for the unit/amount

Special request regarding Subsidiary Y offer form:

- Adding a picture of the product

Summary of order confirmation interview results

To be added

- Bullet points for additional texts
- More additional texts when needed

To be changed

- Text font
- Other visual improvements, information overlaps at times
- +-10% clause to be more visible
- Rephrasing the additional texts
- Rephrasing the tool expenses
- Information on how long the tools will be stored to be more visible

To be removed

- Invoicing addition to be taken away, most customers do not have it
- Any and all prices that might not be relevant for the order
- Tool expenses
- Consider removing the pallet and packaging price mention

Special request concerning the order confirmation form

- Comparing the additional notes on the first page to the delivery terms included on the form

5 REVISING THE FORMS

The objective of this thesis was to create revised offer and order confirmation forms for Company X and Subsidiary Y. For this goal the role of the forms was studied and interviews focusing on finding the aspects in need of revision were conducted. In addition to that, theoretical background of the issue was studied. Using the research conducted in this thesis, the actual revision work was done in this section of the thesis. Both forms were studied separately and the revision work based on interview results, theoretical background and the importance as well as the role of the form in interaction between the commissioning company and the customer.

The revision work described in this section is structured to provide a clear differentiation between the aspects in need of revision. The offer and the order confirmation form information contents are inspected separately. The revision of visual aspects and the creation of example forms with the revised content are described separately from the revision of the information content. The revision work includes supporting the changes suggested during interviews as well as arguing against some of the suggested changes based on the theory gathered.

5.1 Revising the offer form

Based on the interview results and the theoretical background the revision work of the offer form content was conducted. Starting with the biggest concern that the interviewees had, the issue of tool expenses was explored and a solution is proposed in the following manner:

Altogether removal of the mention of the tool prices is not possible for as mentioned several times before; it is mandatory to have all the costs applying to the purchase on the offer form (Kilpailu- ja kuluttajavirasto, 2014). This also has to do with the status of the offer form as a contract between Company X and the customer. In order to keep the costs mentioned, but to take off any unnecessary and possibly misleading numbers from the order, the phrasing has been reworded on the revised form. The old phrasing mentioned the costs for some tools in detail and for some in more vague terms. The recommended phrasing as suggested by one of the interviewed personnel would be as follows:

“Tools will be invoiced according to the realized costs, or according to a separate offer”

This would take away all the precise prizes that do not apply to the majority of the products from the form and could also include the tools needed for the products of Subsidiary Y. This way the tool costs would still be mentioned as required (Kilpailu- ja kuluttajavirasto, 2014), but the confusing factor of numbers that do not apply to every order or product would be neutralized. Similar sentence is already in use in the regards of pallet costs right after the tool costs in the notes section. When looking at this from the point of customer experience management, CEM for short, and its basics in how the customer views the company, the less confusing information the company provides to the customer, the better the customer experience (Schmitt 2007, 18). Good customer experience nurtures the customer relationship (Roberts-Phelps 2001, 1). As mentioned before, these tool costs and the confusion they have caused amongst the customers have caused sales to fall through. This can be explained with the lack of trust that the customer has experienced towards the company after having been offered something during the sales negotiations and then provided with an offer that contains what looks like extra costs that were not agreed upon. A trust between parties is an important factor in customer relationship management (Buttle & Turnbull 2004, 31).

It is also important to notice that having the tool costs invoiced based on separate offer would require creation of such offers. Despite the extra work this might bring, implementation of this is recommended for consideration.

Information that the offer form should have, but at the moment does not have unless specifically added, included the information on palletizing. Based on the interview results, this information is at times asked by the customers and added manually to the offer form. This is done either based on customer request or depending on the person handling the offer, added every time. Adding the pallet information is also supported by the fact that the pallet cost depends on the amount of pallets used as well as the type of the pallet (Company X 2018), having the information of how many pieces of the ordered product are on one pallet would give the customer an inkling on how many pallets the order would include. Adding this information is supported by the status of the form as a contract and the transparency between the company and the customer.

The list of requirements for an offer form by Tieke (2018) included a mention of delivery time. However, as Company X and Subsidiary Y are manufacturing companies, the delivery time is a constantly changing variable that depends on when the offer is made. This variable would make adding such information on the offer a promise that Company X or Subsidiary Y might not be able to keep, forcing the company to break a term on the contract. This is why delivery time has been left out of the revised form.

From the aspect of utilizing the offer form as a sales collateral and helping with the personal selling aspects in selling process, few points in need of revision on the offer form were brought up. The form was judged to be impersonal. As mentioned before, personal selling is a part of creating a relationship between the customer and the company. A lot depends on how the customer views the company and its representative (Johnson, Kurtz & Scheuing 1994, 5). When looking at this together with Followup, the last part of selling process according to Johnson, Kurtz and Scheuing, it can be applied on the offer form as well. In the case of Company X and Subsidiary Y and offer is provided after making contact with a potential customer, this places the offer both in the middle of the selling process but also in the Followup. As a part of the Followup a customer might ask for another offer in the future and be provided with one. This offer will be delivered via e-mail and there is a possibility that the customers will familiarize themselves with the offer before speaking with any company representative. If this is the case, then for a while the offer form represents the company to the customer. The offer form has an end greeting:

“We hope that our offer is suitable to You”

But it lacks any greeting at the beginning of the form. Adding a short greeting such as

“Our offer to you is as follows” or “Here is what we offer” or “Our offer”

could act as a simple reminder to the customer that the offer in question was created for them and change the tone of the form from information package to more proactively customer service oriented. For the same reasons, the suggested addition of end greeting:

“Best regards, Company X”

Could be beneficial, but as the form is supposed to be revised so that it will be applicable to both Company X and Subsidiary Y, this might not be worth implementing. In regards to this all revision work done to the offer form was also done so that the form would be suitable for the use of both the Company X and Subsidiary Y. This was so that the offer form generated by using the secondary ERP system in use at Subsidiary Y could be terminated.

Another suggestion was made about the offers of Subsidiary Y products. It was suggested that the offer could contain a picture of the offered product. After consulting with another opinion on the idea, it was admitted that the possibility of adding pictures is there, but the results of such additions due to the limitations of the system might not be truly useful. It was also noted in another discussion between the author and a representative of the commissioning company, that the visual aid of product pictures or drawings will probably be utilized through the use of the Company X CRM system in the near future. For these reasons, the adding of pictures was left out of the revised form. It was however kept in the recommendations, as this is something that could help the customer understand the product better at the offer and sales process stage.

Other revision points on the offer form have to do with the phrasing of the current contents. The interviewed personnel pointed out that some of the terms on the offer form were exactly not on point. Such information were the “reference number” of the offer, which could be changed to “order number” as that is what it more accurately is. Another similar case was the title of the column where the product information is located. This column is titled as “Explanation” where as it could be named “Technical information” or “Product information”. These changes would once again provide clearer and more accurate representation of the offer form contents.

Some additional information that the revised form could contain but at the moment is lacking form the form was pointed out during the interviews. The order confirmation form has a page of delivery terms which encompass details on copyrights, seller’s duties, buyer’s duties, contract making, application, obligation for cooperation, amending the term and conditions, terminating the contract, ownership and solving of disputes. The offer form has the copyrights mentioned, but with different phrasing than the order confirmation delivery terms.

Other mentioned content of the delivery terms is not on the offer form. Therefore as pointed out by the interviewed personnel, it could be beneficial to consider adding some information from the order confirmation to the offer form. The delivery terms have a section that is labeled as “offer”, this part does not exist on the actual offer form. This is particularly about the period of time when the offer is valid, which is mentioned on the offer form notes, but also of the copyrights that the Company X and Subsidiary Y hold on the content of the offer form. Similarly there is a clause on the delivery terms, which states that accepting the offer creates a contract between the parties. This is not mentioned on the offer form. Accepting an offer is a legally binding contract (Finlex 13.6.1929/228), but adding such information on the offer could be considered.

In the delivery terms there is also a note on the actual delivered amount. In the case of company X and Subsidiary Y the delivered amount can be +/- 10% of the ordered amount. This is mentioned on the order confirmation's notes and delivery terms, but not once on the offer form. The interviewed personnel considered this an important piece of information that perhaps should be on the offer form as well.

Revision of the phrasing of copyright responsibility of third party material on offer form was also suggested, but this had counter opinions and thus the phrasing was left as it is.

5.2 Revising the order confirmation form

Based on the conducted research on theory and the utilization of order confirmation form, revision on the information content was conducted. The points in need of revision were selected based on the interview results of the topic. The biggest concern in the regards of the information content that the interviewed personnel had, was the same as with the offer form; the tool expenses.

The reasons as well as the solution to this are similar as it was with the revision of the offer form. As the tool expenses cannot be completely removed from the order confirmation forms without risking the legality of the form as a contract the issue could be solved with replacing the exact prices and formula with:

"Tools will be invoiced according to the realized costs, or according to a separate offer"

During the interviews the additional notes at the bottom of the order confirmation form were pointed out to be in need of revision. The notes have following information: The prices of certain types of pallets as of a specific date. This however does not include all the pallets in use at Company X and Subsidiary Y. The notes have also the tool expenses that were mentioned before as well as information on pallets being invoiced separately. This is followed by a statement on invoicing being done based on the prices of the delivery date and a note of the tools being stored by Company X and Subsidiary Y for no longer than two years after the last order that requires the said tools. Furthermore it is pointed out that any and all changes regarding the order confirmation must be made two weeks before the confirmed delivery date at the latest. +-10% delivery amount of the ordered amount follows this with a statement that the customer is responsible for checking the delivered amount. This is followed by disclaimer of responsibility to any lost profit caused by delays or defects on the products. It is also mentioned that any defects must be brought to the attention of the seller in a reasonable period of time. The last note is about the copyrights of third party material given to Company X and Subsidiary Y by the customer is the responsibility of the customer.

All these notes were considered to be in the need of revision and to be compared with the delivery terms that are a part of every order confirmation. After comparing the notes with the delivery terms several points were noticed to be overlapping. This means that there is duplicate information of the order confirmation form. The visual improvements hoped on the revised order confirmation will be explained in more detail later, but during the interviews it was pointed out that the additional notes on the order were tedious to read. By removing the duplicated information from the additional notes and relying on the delivery terms, which have note been considered to be in need of revision in the original task by the commissioning company, the additional notes could be considerably shortened. This duplicated information includes: invoicing of pallets, tool storing time, +-10% delivery amount clause, all text regarding defects and delays, as well as the copyrights to third party material responsibility.

With the duplicated information removed, the remaining notes are about invoicing being done on the prices of the delivery date and all changes regarding the order confirmation must be made two weeks before the confirmed delivery date at the latest. The tool prices are mentioned on the delivery terms as well, but not in the form they are marked in the additional notes or in the form suggested replacement phrase to the said tool costs.

In the interview results, displaying of some of the additional notes was hoped to be clearer and some information more easily noticeable on the order confirmation. This wish referred to the storing of the tools and the +-10% clause. As this information is on the delivery terms, having it in the additional notes would create duplicated information. However, removing this information from the notes would be counteractive with the wish of having them displayed more clearly. The sales personnel considered this to be important and that the information should be made more visible to the customer. Therefore it could be considered that instead of cutting this information from the additional notes, it would be kept on the revised form.

Other information that was suggested to be removed from the revised form is the invoicing addition, which according to one interview response, does not apply to most of the customers. However, as no other facts were used to support this claim, and as the invoicing addition does still apply to some customers, the invoicing addition was left on the forms. Another reason for this is the order confirmation's role as a contract. On a contract all costs must be mentioned (Finlex 13.6.1929/228 and Kilpailu- ja kuluttajavirasto, 2014).

5.3 Creating revised offer and order confirmation forms

For the revision to be as beneficial to the company as possible, example forms to illustrate the changes were created. As the original forms are in Finnish, similar forms to illustrate their aspects were created by the author first in Finnish and then in English for this work. Similarly, the revised forms were created both in English and in Finnish. Finnish versions were meant for the company and English versions served their purpose as a part of this thesis work.

The creation of the example forms was done in four parts. First version was the translated copy matching the original form used by Company X and Division Y. Second version was the form with the edited contents, third version had the text font changed and the final version was the completely revised form. The first and the fourth versions were provided to the commissioning company as a part of this thesis work. These revised forms did not contain all suggested revisions, but were meant to show some of the suggested revisions. Rest of the revision suggestions can be found in the list of recommendations that can be found in the appendices.

The model forms showcasing the original forms were copied from existing offer and sales confirmation forms whilst excluding any specific data such as the company name, customer name, product code, customer number or any other detail which would break the anonymity of the commissioning company or be otherwise considered sensitive data. The translation work and the revision work were done based on these model forms.

The revision of the form outlook and design was based on the interview results. This included changing some of the terms into suggested ones as well as reconsidering the positioning of content on the forms. One of the major things changed to the revised form was the font that was considered unappealing and difficult to read. This font was found on Microsoft Word under name Courier New and replaced on the revised form with Arial as a suggestion. Arial was chosen for its versatility to different tasks including visual presentations (Microsoft 2017).

What is important to notice however is the unknown variable of how well the system in use at the Company X is actually capable of adjusting the forms. The suggested revised forms are what has been created based on the research but might be in need of even further adjustments if the system does not bend to or support some of them.

5.3.1 Revising visual aspects

As stated earlier in the theoretical background, offer and order confirmation forms are not only part of the contract making process, but also sales collateral material. As such the points of interest are the visual outlook as well as the way the information is worded (Saget 2006, 115). Information design is a part of the concept of data visualisation. It is used to refer to visual outlook and displaying of data. The most important rule of information design is to choose a presentation method with the clearest possible outcome (Tietonäkyväksi 2016, 32).

The revision work was based on the aforementioned gathered theory of sales collateral material and data visualisation aided by interview results that had to do with the visual outlook of the forms. The most prominent visual issue that the interviewed personnel pointed out, was the font used in the forms. It was described unappealing by many as well as making reading of the contents of the forms in focus of this thesis difficult. As the forms are sales collateral material, the font proves to be an issue on the visual outlook and usability of the forms. The font in question is named Courier New in Microsoft programs and for the revised offer and order confirmation forms the font was changed to a commonly used font named Arial.

Other visual issues were brought about by the information in the forms bleeding out of its designated slot and mixing with information under other headers especially in the case of products. This is due to how the information is inserted into the ERP system. The revised forms have examples on how the product information could be situated and how it would look like if the information did not overlap other sections. This revision was done in order to create more clarity to the forms.

Other text revisions suggested for both forms were bullet points for the additional texts. The interviewed personnel justified this by the messiness of the additional text sections and the level of difficulty of differentiating between clauses. However, the positioning of the additional notes is different on the forms. On both of them the text is situated at the bottom, but on the offer form the text is centred, where as on the order confirmation form the text starts from the left side. With the centred text adding bullet points would result in a visually more confusing formatting. Options in this case would be to leave the text centred and without bullet points or position the text similarly as on the order confirmation. For the revised form it was opted to leave the bullet points out as not to change the entire formatting of the already existing form. For the order confirmation on the other hand, the bullet points were added as suggested.

Revising the phrasing of some of the form contents have been mentioned earlier in revision of offer form and order confirmation contents. These revised phrases have been used on the revised example forms. The comparison between the two can be made on the created model forms. Other adjustments that were recommended by the interviewed personnel, had mostly to do with moving some content and repositioning it within the form. Repositioning of information was done especially on the order confirmation forms, which can be seen from the example forms provided to the commissioning company. One such example has to do with moving the customer number on the offer form from the end of the same line as the customer name to on a line on top of the name. Other suggestions included moving the sales person’s name to the beginning of the offer from and adding the customer service representative’s name.

Other revisions considered for the visual outlook, some of it to do with content additions, were as follows. The column dedicated to amount of ordered pieces on offer form was suggested to be removed, but as other opinions countered this, the column was left as it is. It was also suggested that some additional headers should be added on the forms. These were added and the results can be seen on the revised forms.

6 BENEFIT OF REVISING OFFER AND ORDER CONFIRMATION FORMS

The research question of this thesis was: “How will revising the offer and sales confirmation forms benefit Company X and Subsidiary Y?” With the research on the topic conducted in the previous parts of this thesis, the research question can be answered. In order to wholly answer the question the aspects that the true meaning of the question must be opened. The final answer to the research question is the benefits that the Company X and Subsidiary Y will gain from revising their offer and order confirmation forms. To define all the benefits will require looking at the forms from all aspects. As mentioned before, the offer and order confirmation forms have more than one role in the processes of Company X and Subsidiary Y.

6.1 Benefits of revising the offer form

The offer form is an information package meant to communicate important information about a product to a customer. This information is supposed to urge the customer to buy the product and show them what they will gain and whom they are making business with. When a customer accepts the offer, the offer becomes a binding contract. The original concern of the commissioning company was that the offer form does not fully correspond what is expected of it. During the research conducted on the topic it was noticed that the forms had some aspects that were in need of revision. The issues with the offer form revolved around the tool costs mentioned on the form and on lack of some information that the company employees considered useful. There was also some content, which the interviewed personnel wanted to rephrase. The need for making these changes were argued with the fact that in the past customers have been confused over the tool expenses, which has at some points even lead to sales falling through as the costs they would not even had to pay were considered too high. Argument for adding information such as the amount of products per pallet comes from several customers having asked about it. This information has been often added on the offer manually. Rephrasing of some information was justified with clarity of the message of the offer form, as some terms were considered clumsy.

The benefits of revising the offer form revolve around theses issues. By removing the exact tool costs and replacing them on the form with a vaguer expression, as explained in revising the offer form, the numbers that have confused the customers in the past will not be in view anymore. This means that the sales personnel have fewer objections to worry about as a part of the sales process (Johnson, Kurtz & Scheuing 1994, 87-95). This was mentioned several times by the interviewed personnel. Revising the offer form would therefore prove beneficial in profit, as the issue would be solved. After all, as mentioned before customer acquisition can be a costly process and therefore its success is important (Galetto 2018). Similarly, adding the information that has frequently been asked by the customers on the offer forms as a default information will spare the customer from having to specifically ask for the information that they feel has lacked from the offer and spare the sales person or customer service representative the time it takes to look for the information and manually add on the offer. Rephrasing of some of the contents of the other hand has to do with the language aspects of sales collateral material. A properly made sales collateral material is an easily understandable aid to sales work. It also helps with maintaining customer relationships (Saget 2006, 113).

On top of all this, the revision of the offer form to suit all products and situations the form is needed in, will make way for terminating the use of the offer form generated from the secondary ERP system in Subsidiary Y. With information that was inconsistent towards the products of Company X and had no relation to the products of Subsidiary Y at all removed, one of the reasons to keep using the secondary offer form has been nullified. With the use of the same offer form in both Company X and Subsidiary Y, the company's communications to the customers will be more uniformed. As such, not only does this base on the sales collateral material theory by Kotler, Rackham, & Krishnaswamy, but also on customer relationship management as a unified way of treating the customers and on the customer experience management as the service the customer receives is similar from all sections of the company.

6.2 Benefits of revising the order confirmation form

Once a customer has placed their order, the company must supply them with an order confirmation (European Consumer Centre Finland, 2015). Order confirmation form is supposed to contain information on the ordered products, the delivery date and delivery terms as well as contact information of the company. Just like the offer form, an order confirmation is considered a binding contract. The reason for the revision work was done for the order confirmation form is similar with the reasons behind the offer form revision: The commissioning company believes that the order confirmation does not fully correspond what is expected of it. In the ordering process of Company X and Division Y an order confirmation is provided via e-mail after the order has been inserted in to the ERP system. The form includes information on both the customer and the company, product details, ordered amount and pricing as well as the delivery time and delivery terms. This is all information that is required of such from, but during the research done on the topic it was found that the contents aren't as well defined as they should be. Order confirmation has a similar issue with the tool expenses as the offer form. The tool expenses are marked down in detail but do not apply to most orders or correspond the actual costs.

Other aspects of the order confirmation form subjected to revision were the contents of the additional notes on the order confirmation form as well as some rephrasing requested to some terms used on the form. I addition to these, visual improvements for the sake of clarity were requested.

The benefits of the revision work can be found in the reasons of considering the subjects that have been suggested for revision. The tool expenses have caused confusion amongst the customers in the past. This is why, just as with the offer form, these costs should be removed and replaced with a mention of the tool costs without any specific numbers. This is supported by the customer relationship management theory as a part of creating trust and transparency between customer and the seller (Buttle & Turnbull 2004, 31) as well as part of sales processes as this revision removes one objection that needs to be handled before closing the deal (Johnson, Kurtz & Scheuing 1994, 53).

The revision of the additional notes, where the tool expenses are located as well, proved to be the biggest part of the order confirmation in need of revision and as such was subjected to most notable changes. As the order confirmation has delivery terms attached to every form sent to the customers, and given the fact that these delivery terms to not be subjected under revision work, it was noted that several additional notes were actually duplicates of information on the delivery terms. This added to the need of clarifying the additional notes and making them more readable, brought about great change to the form. This revision was requested during the interviews, as the additional notes were considered cluttered and difficult to read as they were. The benefit of the revision of the additional notes can be found in the cleaner and neater outlook of the order confirmation form and shorter more easily readable additional notes. Some additions to these notes were made as per requested during the interviews, despite causing some duplicate information, this information was considered important for the customer to notice easily. All this was done with the order confirmation form’s status as a sales collateral material (Saget 2006, 114). Clear easily understandable sales collateral material serves as a communication channel from the company to the customer Saget (2006, 115). Visualised data is easy to understand, but the simpler it is, the better (Tietonäkyväksi 2016, 32) and in the case of sales collateral material, more beneficial to the provider of data. Rephrasing some of the terms and headers on the order confirmation form fall in to the category of creating better sales collateral material and benefitting from the easier understandability and accuracy of the contents.

On top of this, even as both Company X and Subsidiary Y use the same order confirmation form it is worth noticing that not all the contents of the order confirmation form have applied to the products of the Subsidiary Y. Biggest issue having been the tool costs. This has caused confusion with the customers and for the same reasons as with other revisions done on the tool costs and other information content; this will benefit the Subsidiary Y.

6.3 Summary of the benefits

To summarize the benefits of the revision work of offer and order confirmation forms, one word rises above others: Clarity. Clarity is a term that can be defined as to being quality of being well explained and easy to understand according to Collins English dictionary (Collins English Dicitonary). According to same dictionary, the synonyms of clarity are clearness, precision, simplicity and transparency (Collins English Dicitonary). These are all qualities that were sought after for the forms in the interviews and in other research work: clearness to the way the forms represent the company, precision for the applicability of the information on the forms to the products and the company needs, simplicity of the information and the outlook backed up by the golden rule of data visualisation, transparency through removing any and all confusing pieces of information that might overshadow the building of trust in customer relationship.

The greatest benefit of the revision work is two clear forms that can be applied to all products of both the Company X and the Subsidiary Y without inconsistencies or confusion amongst the customers caused by tool expenses, with clear terminology and easy to read additional texts. This will also benefit the employees of Company X and Subsidiary Y as they do not have to constantly answer to the same questions about the contents of the forms and can focus on their other duties. Adding information as default on the forms will also help with this in the case of pallet information that is constantly added manually on the offer form. The revision work is beneficial to the company, as the issues have been proven to touch the customers as well as the employees.

7 RECOMMENDATIONS

The following section is dedicated for recommendations based on the research done on the topic: Revising Offer and Order Confirmation forms for Company X and Subsidiary Y. After conducting an interview and thoroughly analyzing the answers and comparing them with the gathered theory on the topic several points of revision on the forms were found. These revisions are recommended for Company X and Subsidiary Y in order to make the offer and order confirmation forms as accurate and corresponding to the products and the company as well as possible. A full list of recommendations can be found in the appendices, the list will include a polished version of the summary of interview created based on the analysis conducted on the results during the revision work.

As pointed out for both forms, the notes regarding the tool expenses are problematic. This is definitely something that needs to be considered for revision by the company, as there is a possibility of losing profit and time with the current status of the forms. The tool expenses are also problematic on the point of view of the terminating the use of the secondary offer form of Subsidiary Y, as the tool expenses do not apply on the products of Subsidiary Y.

Other recommendation is to revise the additional texts both forms, but with more detail paid to the additional notes on the order confirmation form as those are longer and complex and have several points that overlap with the contents of the delivery terms attached to the order confirmation. When doing this revision it is recommended to consult the sales personnel and the customer service representatives in order to best define the pieces of information that could be beneficial to leave as duplicates on the form if any.

Many terms on the forms were rephrased based on the suggestions of the interviewed personnel, these revisions are supposed to bring more accuracy and clarity to the forms and as such are worth considering.
As noted earlier in this work some of the product information is duplicated in the product field of the forms. This is due to the way the product information has been inserted to the ERP system. This duplicated information has no significant usage and is therefore adjacent to the revision of the offer and order confirmation forms, it is recommended to consider inspecting and revising the way the information is inserted to the system to avoid duplicated data on the forms. This revision would help with the clarity of the forms.

The visual aspects of the forms were also under consideration for revision in this thesis and after the interviews and research it is recommended that some revisions should be made on the visual outlook of the forms. Most notable of these revisions is to change the font into something less crammed than Courier New.

In addition to the above, during interviews it was suggested that possibility of adding pictures or other visual aids on the offer form especially in the case of Subsidiary Y products. This could help the customer to understand better how the Subsidiary Y products look like and what are their possibilities in terms of customization. It is recommended to look into this and consider the application of such visual aids in some way, even if it is not on the offer form itself.

It is however important to notice that these recommendations are made based on the research displayed previously in this thesis and without accurate understanding of what can be done and what cannot be done with the ERP system. This can affect the implementation of the revision of the content and visualization.

8 CONCLUSION

Revising offer and order confirmation forms for Company X and Subsidiary Y is a case study of the forms in focus. The study focused on the problem that the commissioning company Company X has with the forms, their content, the contents relation to their functionality, the visual outlook and the over all applicability of the forms to their tasks as documents in the ordering process of Company X and Subsidiary Y. In short, they are lacking in clarity.

Because of this the main goals of this thesis were determined to be the revision of both the offer and order confirmation forms and providing the commissioning company with a list of recommendations as well as model revised forms as examples of the changes and results of the study as well as determining the benefits of the revision. To support the study and research of how the revision of the forms will benefit the company, a research question was created and answered.

Together with the gathered theoretical background gathered on the problem as well as the understanding of the order process of the commissioning company and interviews conducted with the sales personnel and customer service representatives who regularly work with these forms, several aspects that need revision were found. These aspects were studied with references on the theoretical background in order to find best solutions to the issue.

With all the research done and data on the issue gathered it can be said as a conclusion to this work, that the commissioning company was correct in their assumption that the forms do not perfectly correspond what is expected of them in their current state. The revision suggestions displayed in this thesis are meant for the commissioning company's consideration and to act as a guide to what aspects of the forms should be especially paid attention to. These recommendations encompass the content as well as some visual aspects of the form all with the goal of making the offer and order confirmation forms clearer and more applicable to their tasks.
For this task, enclosed with the thesis are example copies of revised forms as well as a list of recommended revisions.

Offer and order confirmation forms are more than just a part of the document flow associated with order process. They are contracts as well as information package and a channel between the customer and the company. They are sales collateral material that represents the company and are used as reference in interaction between the customer and the company. For these reasons, it is recommended that the offer and order confirmation forms in use at Company X and Subsidiary Y are revised so that the forms can be utilized and benefitted from in the best capacity.

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Appendix 1

List of recommendations

<u>List of recommendations for revising the offer and order confirmation forms:</u>

- Tool expenses to be changed to: “The tools will be invoiced according to the realized costs, or according to a separate offer”
- Additional notes content to be revised
    - Duplicate data to be removed from the order confirmation form with exception of information that is considered important to be located there
    - Consider adding information from order confirmation notes to the offer form additional notes
- Adding pallet information
    - Product amount per pallet
- Consider revising the way the product information is inserted into the ERP system to avoid duplicated data on the offer and order confirmation forms.
- Rephrasing some terms on the forms and adding clarifying headers
- Repositioning some content
- Change the font used on the forms
    - Courier New to be changed to something else