Ville Vainola

Sales Plan Framework for Operational and Performance Qualification Service

Helsinki Metropolia University of Applied Sciences

Master's Degree

Industrial Management / Logistics Management

Master's Thesis

29 April 2021

Metropolia

This has been an intense nine months of studying and finally it is coming to an end. The journey has been very challenging but at the same time it has been rewarding. I have learned a totally new field of study that will support my personal growth in the future. The Industrial Management studies has provided me a true passion towards the salesmanship, business management and development.

First, I would like to thank my employer for making the studies and this thesis possible. I want to thank all the people involved in this thesis project. Without your help and guidance this journey could have been impossible to finish. I would like to thank all the stakeholders, co-workers and customers for the interviews and workshops that helped us to better understand our processes and to create a solution that will make our daily work easier and more consistent. I want to give a special thanks to Veijo and Ville for cheering me through the thesis process and Daniel who first came up with the idea for the thesis and for being a great mentor.

I want to thank my faculty instructor Dr. James Collins for all the meetings and great guidance throughout the thesis process. Also, a huge thanks to Sonja Holappa for reviewing my work and helping me to improve my writing skills. The individual support and guidance received from the faculty is greatly appreciated.

Finally, I want to thank my family for all the support I have received. I want to thank my mother for helping me in planning and reviewing the thesis. Also, a huge thank you for Laura for all the encouragement and believing in me. Thank you for understanding the long and stressful nights of studying.

Ville Vainola
Helsinki
April 29, 2021

Author Title Number of Pages Date	Ville Vainola Sales Plan Framework for Operational and Performance Qualification Service 63 pages + 1 appendices
Degree	Master of Engineering
Degree Programme	Industrial Management / Logistics Management
Instructors	Dr. James Collins, Senior Lecturer, Industrial Management Sonja Holappa, Senior Lecturer, Industrial Management Veijo Nerg, Senior Specialist, Caverion Finland Oy

The business challenge in this thesis was that Sales Plans were not used for any service by the case organization. Consequently, this thesis focused on creating a measurable Sales Plan Framework for one of the services provided by the Advisory Services organization operating as part of Caverion Finland Oy. The Sales Plan Framework was needed to be able to create a comprehensive and measurable Sales Plan for the service.

The thesis is based on qualitative research methodology that uses semi-structured interviews as a data source. The thesis proceeded from Current State Analysis for the current Sales Plan and the Sales process, to literature research for contextually relevant literature. The initial proposal for the Sales Plan Framework was co-created with the Key Stakeholders and the Business Management and the final proposal was validated with relevant Stakeholders.

The outcome of this thesis is a measurable Sales Plan Framework. With the Sales Plan Framework the Key Stakeholders are able to create a Sales Plan that address most of the weaknesses and highlight the strengths revealed in the Current State Analysis. With the added measurability the need for the development can be justified to the management.

The Sales Plan Framework will be put in use in the case organization in the future after the implementation and piloting has been agreed on with the business management. The implementation must be done at a specific time of the year, so the piloting of the Sales Plan Framework is out of the scope of this thesis.

Keywords	Sales plan, framework, business development

Contents

List of Figures

1 Introduction

There are several characteristics for the sales plan to be successful. The Sales Plan must be documented, measured, controlled, and renewed at certain intervals for it to be effective. Without proper Sales Plan, the sales of the service cannot be properly executed, controlled and the development need may not be justified to the Business Management.

This thesis focuses on finding a solution to create a framework with measurability for a Sales Plan of one of the services provided by Caverion Finland. Thesis focuses on creating a documented and effective Sales Plan Framework for the service while ensuring the customer understanding and enabling growth for the service in the market.

The service being provided is still in initial phase and service context and reporting has been evolving as new improvement ideas have been found. The current Sales Plan for the service currently exists only on discussion level with the stakeholders and it has not been documented yet.

1.1 Business Context

This thesis is conducted for Caverion Finland which is part of Caverion Group. Caverion is a leading building and industrial service company operating in 11 different European countries. Caverion Finland operates in over 65 locations in Finland and Baltics. In 2019 the company's revenue was EUR 2.1 billion. The company is headquartered in Vantaa, Finland.

The company has two business units: Services and Projects. This thesis is executed in services business unit. Services business unit provides wide variety of complete services for buildings and industries with technology, digitalization, energy efficiency and sustainability as key themes in the business.

The thesis is carried out for Operational and Performance Qualification team in the Advisory Services organization which is part of the Services Business Unit. Advisory Services consist of Energy Management, Operational and Performance Qualification, and Remote Management teams. In total there are currently over 30 employees working in the Advisory Services. The organizational chart for Caverion Finland and Baltics is presented below.

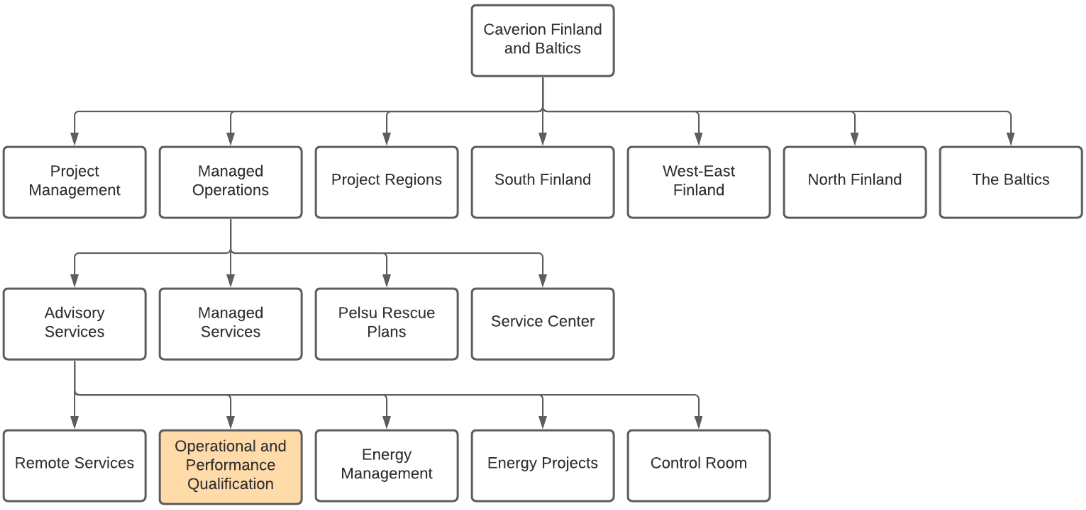

Figure 1. Caverion Finland and Baltics organizational chart

The Operational and Performance Qualification team was found in January 2019 to meet the needs of customers who have potential improvement needs in their building automation systems. The service being offered is also called as Operational and Performance qualification (OPQ). From now on in this study the Operational and Performance Qualification service is referred to as the OPQ service. The current sales plan for the service being offered by Operational and Performance Qualification team is scattered and not measured in any way. An improved sales plan that can be measured needs to be created to be able to answer the customer needs more accurately and to ensure the measurability can utilized in reviewing the results and as part of justifying the further development needs of the service. Without an effective sales plan the OPQ service is not able to create the needed growth in the market to meet the given targets and without measurability of the sales plan the market growth may not be justified to stakeholders. First, a sales plan needs to be created to be able to create growth in the market and second, success of the sales plan needs to be measured to see if the target has been met and to prove the market need and the growth to the stakeholders.

1.2 Business Challenge, Objective and Outcome

The business challenge is that the current sales plan for the OPQ service is not documented properly, and it is therefore not measurable, making it impossible to justify the improvement needs. This results in three key problems; the hit rate for customer quotations is currently too low, the service description is too complex for some customers, and the market potential and need for the offered service in not clear for the stakeholders.

The objective of this thesis is to create a framework for a sales plan with added measurability for the Operational and Performance Qualification service. In the future the sales plan is going to be measured and continuous improvement methodologies will be applied to achieve growth for the service and improve the quality of the service.

The outcome of the thesis is a Sales Plan Framework for the Operational and Performance Qualification service.

1.3 Thesis Outline

This thesis includes the building of the Sales Plan Framework and definition of how the sales plan can be measured. The building and testing of the first Sales Plan made according to the Sales Plan Framework are excluded from this study because the implementation of the first documented Sales Plan is going to be executed at the specific time of the year and the preparation of the first documented Sales Plan takes time and needs to be approved with the business management.

The thesis contains seven sections starting with the introduction of the company, business challenge as well as thesis objective and the planned outcome in the first section. The second section describes the research approach and design used in this thesis, including data collection and analytics methods.

The current state analysis for the Sales Process and the Sales Plan is carried out in the third section. The Current State Analysis is done by arranging interviews for the stakeholders in the case company. The results of section 3 conclude the list of strengths and weaknesses of the current Sales Process and Sales Plan.

In the fourth section the existing knowledge and best practices from the relevant literature is introduced. The section 4 focuses on finding the right tools and methods from the literature for building the Sales Plan Framework according to the needs based on the findings from the Current State Analysis.

Building the initial proposal for the Sales Plan Framework is described in section 5. The section describes the process how the initial proposal is built and what tools and methods are implemented to the Sales Plan Framework by using ideas from the Conceptual Framework from section 4. In section 6 the initial proposal is validated in workshops and interviews with the key stakeholders and the final proposal and recommendations for implementation are discussed.

The seventh section concludes the thesis by summarizing the outcome and further improvement ideas for the Sales Plan Framework. Section 7 additionally contains the thesis evaluation by following the principles of Responsible Conduct of Research (RCR).

2 Method and Material

In this section the methods and materials used in this study are described. In the first subsection the research approach is introduced, followed by research design in the second section. In the third section the tools used for data collection and analysis are introduced.

2.1 Research Approach

Choosing the best possible approach and research methodology for the study is important, because with unsuitable approach the study does not gain the desired depth and resolution. This thesis utilizes applied action research methodology with qualitative research methods as research approach. This approach is the most suitable for the study since there is no former information for the phenomenon, clear hypothesis, and in-depth view on the occurring problem is needed. According to Kothari (2004: 3) applied or action research can be utilized for finding a solution concerning business organization.

Qualitative approach may be applied in different situations. According to Kananen (2013: 31) qualitative research is best suited to situations where, there is no already existing information, theories or research for a phenomenon, more in-depth view is needed to describe the phenomenon, new theories and hypothesis are needed to be created, mixed research strategy is going to be used or a good description of phenomenon is required.

The below diagram presents the basic principle of qualitative research process for individual qualitative research by Kananen (2013: 103).

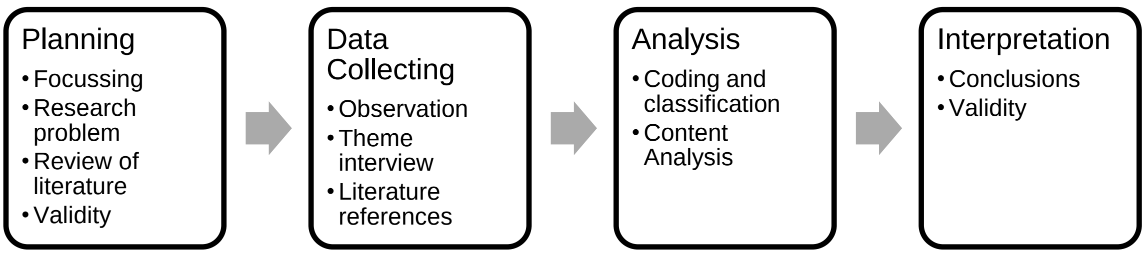

Figure 2. Process diagram for qualitative research. Adapted from: Kananen, J. 2009.

The key features of qualitative research are that it provides appropriateness of methods and theories used, it provides different perspectives of the participants and their diversity, it ensures the reflexivity of the researcher and the research and with qualitative research variety of approaches and methods may be used. (Flick 2006: 14)

According to McNiff (2013: 38) action research consists of two parts, the action part, and the research part. In action part of the research the current circumstances are reviewed. The research part of the action research consists of data-gathering from multiple sources to produce conclusions from authenticated evidence. In action research, offering description for activities is not enough, the study must also provide reasons and purposes for the activities (McNiff 2013: 28). In this thesis some principles of action research are applied to research the ongoing business problem in the target organization.

In this thesis conceptual framework is built based on contextually relevant literature and by using available expert insight within the company.

The data collected in this study is mostly qualitative because in-depth understanding from current state of the process and its problems are needed to be able to define the key issues in the process. Data is collected mainly by interviewing stakeholders in individual semi-structured interviews and in workshops involving more than one stakeholder. Qualitative research focuses on collecting data from experiences and views of persons involved in study from the case organization. In quantitative research methods the results are based on quantity or amount. To gain accurate information for the study qualitative research methods are used instead of quantitative (Kothari 2004: 3). Quantitative research methods may not give accurate enough information about the experiences and views of the participants as quantitative methods are used to gather large amount of numeric data from different kind of sources for the study.

2.2 Research Design

Research design for this study contains four stages. In figure 3, each step of the research design is illustrated. On left side of the diagram the data collection and methods for each step is presented. The middle part of the diagram presents the main stages of the study. The outcome of each step is presented on the right side of the diagram.

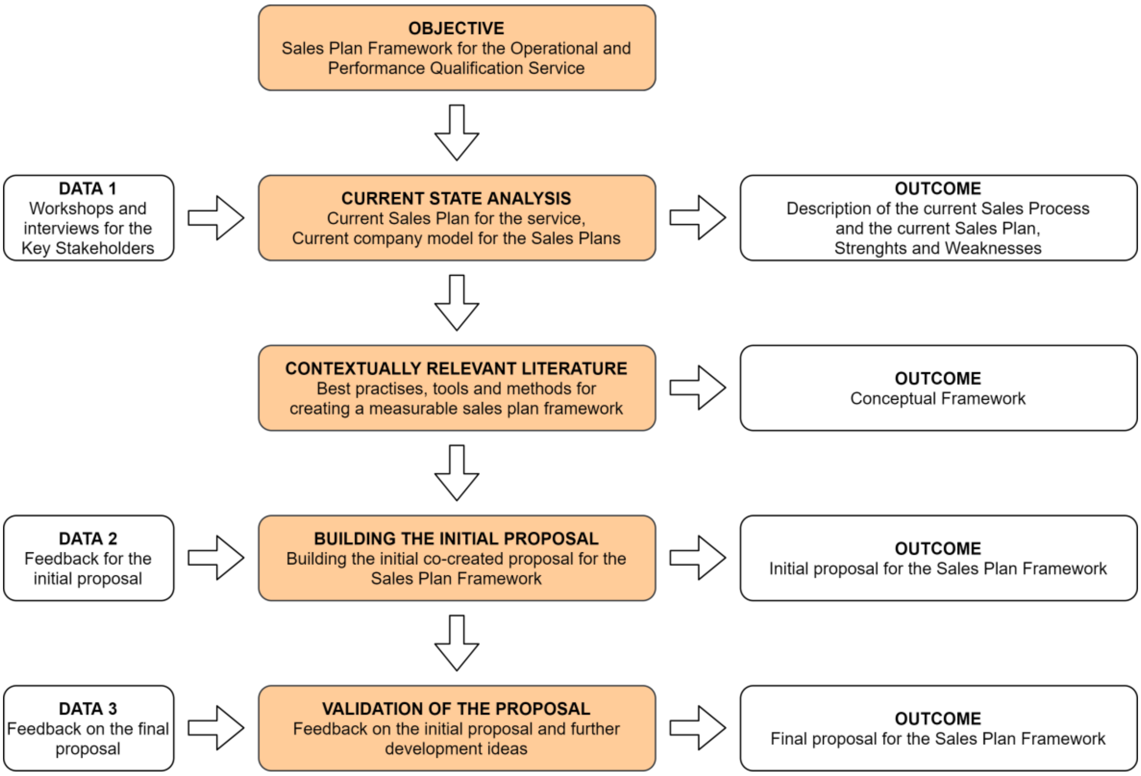

Figure 3. The Research design for the study

As seen in Figure 3, the study started from defining the objective. First stage of the research was the current state analysis for the process involved in the study. Data 1 was collected and analyzed for the current state analysis. Data for this stage was collected within case team and other relevant participants such as sales representatives through workshops and interviews. According to Kananen (2013: 111) interviewees should be selected so that the phenomenon being researched is associated to them or they are concerned with the phenomenon. The outcome of current sate analysis was a comprehensive scope and priority for the study and list of current strengths, challenges and improvement needs.

The second stage of the study included the literature review from contextually relevant literature to create understanding of best practices for the improvement needs from a theoretical viewpoint and expert insight from the sales representatives to create understanding from practical point of view. The outcome of the second stage was the conceptual framework. The conceptual framework concludes from best practices from literature to form a comprehensive theoretical foundation for the proposed outcome of this thesis. At the third stage the first improvement proposal was built based on the improvement ideas gathered in previous stages and views from the sales representatives. Data 2 was used as input for the building of the initial proposal. The outcome of the third stage was an initial proposal for the Sales Plan Framework.

At the fourth stage the proposal draft for the Sales Plan Framework was presented for the key stakeholders and feedback was gathered as data 3. The outcome of the fourth stage was the final proposal for the Sales Plan Framework, and it concluded the final thesis.

2.3 Data Collection and Analysis

The data for this study is based on qualitative data. The data collection was conducted in three different rounds. Data collection was applied to the current state analysis to create comprehensive understanding of the current state of the sales plan and sales process (Data 1), to gain feedback and development ideas for the initial proposal (Data 2) and to validate the final proposal with the Key Stakeholders and the business management (Data 3). Table 1 below shows the details on the data collection.

Table 1. Details of interviews, workshops, and discussions in Data1-3.

	Participants / role	Data type	Topic, description	Date, length	Docu-mented as
Data 1, Current state analysis					
1	Interviewee 1: Senior specialist	Face-to-face in-terview	Sales plan and process mapping for case service	Jan 2021, 60min	Field notes Process map
2	Interviewee 2: Account Manager	Microsoft Teams interview	Semi-structured interview for current state analysis	Jan 2021, 65min	Field notes
3	Interviewee 3: Real Estate manager	Microsoft Teams interview	Semi-structured interview for current state analysis	Jan 2021, 30min	Field notes
4	Interviewee 4: Unit Manager	Microsoft Teams interview	Semi-structured interview for current state analysis	Jan 2021, 55min	Field notes
5	Interviewee 5: Head of Managed Operations	Microsoft Teams interview	Discussion about com-pany sales strategy and sales plans	Feb 2021, 45min	Field notes
6	Interviewee 6: Head of KAM & Serv. Dev.	Microsoft Teams interview	Discussion about com-pany sales strategy and sales plans	Feb 2021, 60min	Field notes
Data 2, Building the proposal					
7	Interviewee 1 and 4: Senior specialist, Unit Manager	Microsoft Teams workshop	Building the 1st proposal for the Sales Plan Frame-work	Mar 2021, 90min	Field notes
8	Interviewee 7: Key Account Manager	Microsoft Teams workshop	Feedback for the 1st pro-posal of the Sales Plan Framework	Mar 2021, 60min	Field notes
Data 3, Feedback on proposal					
9	Interviewee 7: Key Account Manager,	Microsoft Teams workshop	Feedback for the final proposal of the Sales Plan Framework	Apr 2021, 60 min	Field notes
10	Interviewee 1, 4 and 5: Senior Specialist, Unit Manager, Head of Managed Operations	Microsoft Teams workshop	Feedback for the final proposal of the Sales Plan Framework	Apr 2021, 90 min	Field notes

As presented in Table 1, data for this study was collected in three rounds. The data for current state analysis (Data 1) was conducted in the first round. The data for the first round consists of views from different stakeholders to create an accurate overall picture of the current state.

In the second round data for building the proposal draft (Data 2) was collected. The data in second round includes expert insight for co-creating the proposal for improved sales plan and process. In the final round feedback for the proposal draft (Data 3) was collected. Data for final round included feedback given on the proposal from the unit and organization leaders, as well as other relevant stakeholders of the case company.

In this study, interviews were used as a primary method of data collection. The interviews were conducted as semi-structured, face-to-face, or online meetings in company premises. Questions for interviews were constructed based on the first process mapping session held in the beginning of January 2021. Questions were categorized under specific themes based on interviewee expertise. In some interviews, questions were asked from many categories if interviewee had expertise from several categories. The interview questions were sent to interviewee beforehand so that answers could be thought of in advance.

The questions for the semi-structured interviews regarding the Current State Analysis can be found in Appendix 1. The data for each interview and workshop were recorded as field notes document.

3 Current State Analysis

In this section the current state of the sales plan and the sales process is described. To be able to recognize the current sales plan it is essential to also understand the current sales process since the sales plan is not yet created or documented in any way.

This section provides a definitive description of both the sales process and the sales plan. The Current State Analysis for the sales process and the sales plan has been constructed by interviewing the key stakeholders involved in the sales process and the management. Key stakeholders for the sales management and the sales process consist of sales representatives, specialists, customers, and managers. The sales process was mapped in a workshop involving the specialists responsible for providing the service.

3.1 Overview of the Current State Analysis Stage

The Current State Analysis was conducted by arranging a set of semi-structured interviews and a one workshop. The first step of the Current State analysis was to conduct a workshop to gain the overview of the sales process of the OPQ service as it has not been previously documented.

The second step was to create a set of questions for semi-structed interviews based on the description of each step of the sales process to gain deeper understanding about the strengths and weaknesses of each step of the current process. Also, a set of questions about the current sales plan policy of the company was added to interview, because the company sales plan policies are not clear for the OPQ service providers and therefore not yet created or documented in any way to support the sales.

The third step was to conduct a set of interviews for the service stakeholders. The interviews were conducted from different perspectives to create a good overall picture of the current state of the sales plan and the sales process. Also, the customer perspective was taken into account to gain an important external view of the customer perspective of the sales process.

The fourth step was to interview the company's Head of Key Account Managers and Service Development for an additional clarification about the company sales strategies and the sales plans to gain more information about the current sales strategy, already used sales plans and how they are implemented in different business units. The fourth step was needed because it became clear in the interviews that the sales strategy and the sales plans are not properly, if at all, implemented in the business unit explored for this thesis.

In figure 4 below the current Sales Plan is presented. The current Sales Plan does not follow any specific Sales Plan related framework or technique and it is completely built up by the specialists providing the OPQ service, and who do not have any previous experience on creating or implementing Sales Strategies or Sales Plans. The current Sales Plan is not measurable, but it has some continuity as the positive experiences are used as examples when presenting the OPQ service to potential internal or external customers. Therefore, it could be said that the specialist providing the service are aware of some basic principles of sales planning, but the current sales plan is not profoundly reasoned and validated with the sales strategy.

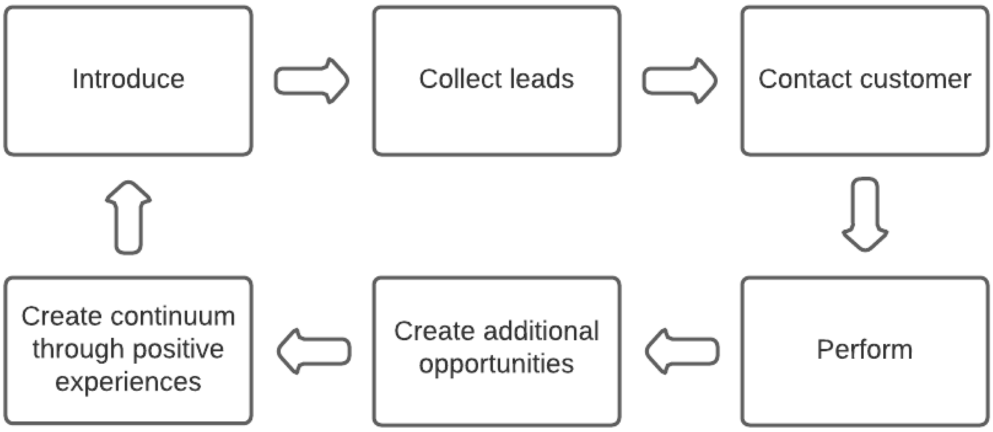

Figure 4. Overview of the current Sales Plan

Although the current sales plan is not yet documented the basic principle of the sales plan could be recorded in the interview 1. The first step of the sales plan is to introduce the service to potential stakeholders who could introduce and sell the service forward to the customers or make requests for quotations. In the introduction step the awareness of the OPQ service is raised in order to gain more orders. The introduction phase is part of the sales process and it is described in subsection 3.2.

The second step of the sales plan is to collect potential leads from different sources. Potential leads vary from almost completed quotation requests to data sources which require more work before it can be turned to quotation. In lead stage the potential leads are collected, and the interest of the customer is trying to be achieved. Lead collecting phase is part of the sales process and it is described in subsection 3.3.

The third step of the sales plan is contacting the customer. In customer contacting phase the service is quoted to the customer and the goal is to try and turn that quotation into sales. The customer contacting phase is part of the sales process and it is described in subsection 3.4 followed by the fourth step which is called the perform phase. The perform phase includes the actual Operational and Performance Qualification and the reporting which is described in section 3.5.

The fifth step of the sales plan is to create additional opportunities based on the observations made in the Operational and Performance Qualification. In the sales process map this is called the follow-up phase. The follow-up phase is described in section 3.6.

The last step of the sales plan is to create a continuum through positive customer experiences. If the customers are satisfied with the results of the OPQ service, they are more likely to order again or spread the awareness about the service. The continuum in sales plan is justified as the potential new customers may want to hear more about the service and a new introduction round is arranged with the customer. The sales process does not contain this step as the sales process for each customer currently ends after the follow-up actions are agreed on.

In figure 5 below the current Sales Process for the OPQ service is presented followed by a detailed explanation for each step of the OPQ service sales process.

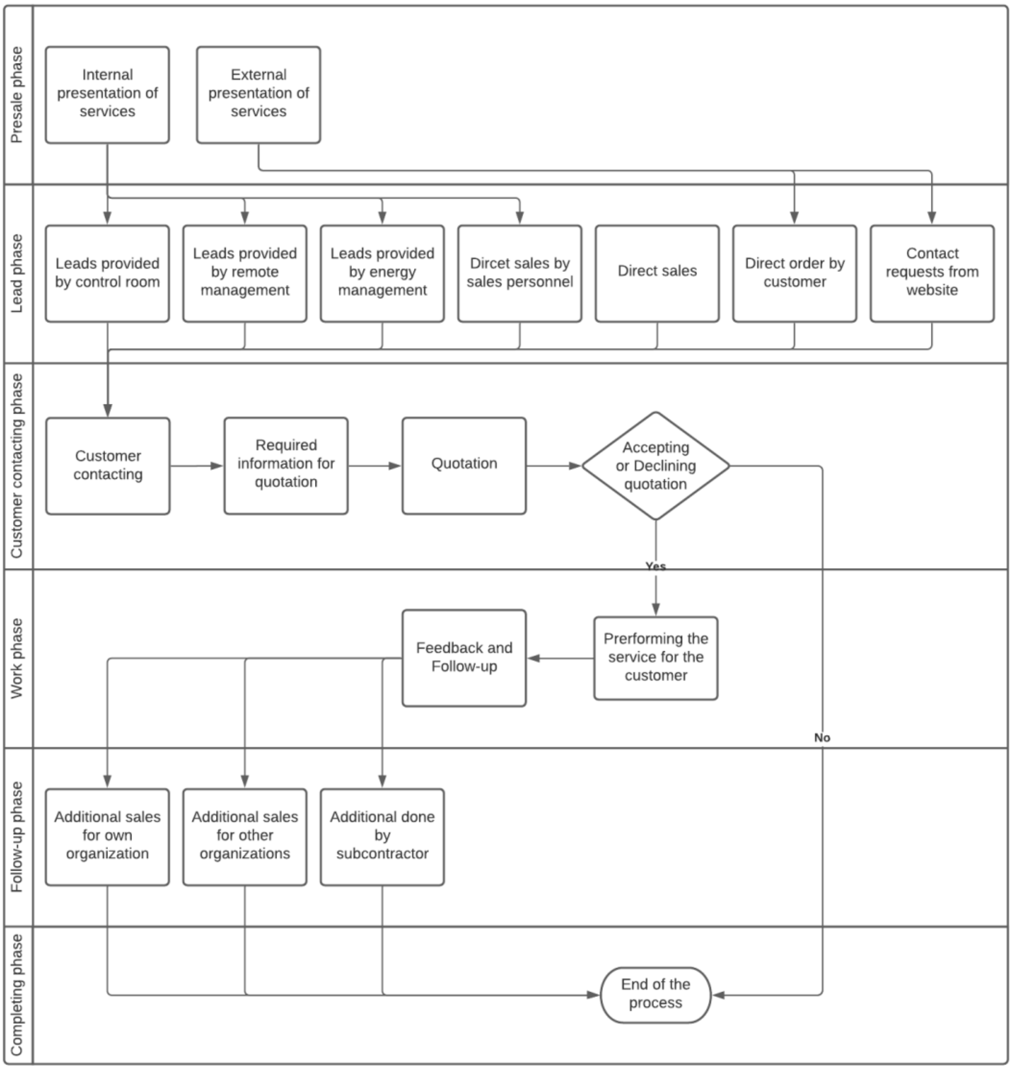

Figure 5. The sales process of Operational and Performance Qualification service.

3.2 Presale phase

In the presale phase the OPQ service is introduced to internal and external stakeholders such as internal and external technical building managers and other potential customers. The presales phase is divided to internal and external part as the introduction for different types of stakeholder has different contents. Internal introduction also discusses the potential customers and pricing in more specific manner. In external introduction the service is explained to customer more on practical approach since many customers does not have any technical background and therefore it is very important to keep the introduction for the service as simple as possible.

3.2.1 Internal presentation of services

As the service provided by Operational and Performance Qualification team is only two years old, the sales and other relevant personnel is not completely aware of the sales process and benefits of the service provided. The OPQ service has been introduced internally in several different types of meetings organized for relevant personnel from the sales perspective. Internal service introduction has been focused mostly on sales personnel and technical managers as they are mostly working in customer interface. Also, some other personnel such as team leaders has been included in introduction as they might have potential development ideas for the service or more deeper knowledge about customer potential and need.

3.2.2 External presentation of services

The OPQ service is also new to many external customer organizations, therefore it is important to spread knowledge about the service whenever possible. Currently the service is introduced as part of offering of the Advisory Services. Typical external presentation situation is that a member of Operational and Performance Qualification team is occasionally asked by a member of the advisory Services organization or the sales organization to introduce the OPQ service to a potential customer.

3.3 Lead phase

Th lead phase consists of indirect and direct leads provided by other teams and organizations. The direct lead is considered as request for a quotation or as a straight order from customer and an indirect lead is considered as a request for guidance which may be turned in to sales later.

There are currently seven different types of leads recognized. The different types of leads are listed below:

- Lead made by Control Room
- Lead made by Remote Management team
- Lead made by Energy Management team
- Direct sales made by Operational and Performance Qualification team
- Direct sales made by salespersons
- Direct order made by internal or external customer
- Contact request from website

In the following subsections different types of leads are described.

3.3.1 Lead by control room

Caverion 24/7 control room is handling high priority alarms coming from customers building automation systems. Control room operators check the reason for the alarm with a remote-control access to building automation system and tries to resolve the occurring problem without need of going physically to building. Problems which cannot be resolved with the remote-control access to the building automation system are redirected to building maintenance personnel or technical building manager depending on urgency and type of the situation.

Occasionally some building automation systems might send thousands of alarms to control room and start to overflow the alarm monitoring system or some building automation systems might have lots of occurring problems that would need more specific approach. In these cases, control room operators create a ticket in Customer Relationship Manager for specialists in Operational and Performance Qualification team. Specialist contacts the technical manager or the owner of the building, explains the situation of building automation system and offers the OPQ service to make a comprehensive report of the occurring problems in building automation system.

According to interviewee 1 although this is the most recently adopted way of creating leads, it has been effective way to create new leads. The interviewee 1 also states that there is unfortunately not enough time to go through every lead created by control room operators.

3.3.2 Lead by remote management team

The remote management team performs periodic building automation system inspections for the building owners. The inspections are done with a remote connection and findings are reported via CRM to a contact person which usually is from building owners outsourced technical management company. Occasionally the remote management team discovers problems in building automation systems that need a physical inspection by a building automation specialist. From this point on process proceed same way as described in chapter 3.3.1.

3.3.3 Lead by energy management team

The energy specialists perform a periodic energy monitoring service as part of the energy management team’s offering. As part of this service the energy specialist monitor electricity, heating and water consumption of the customers building portfolio and reports the findings in periodic meetings to the technical managers and the building owners.

According to interviewee 1 the easiest way to find leads is by examining deviations in the energy consumption which is done as part of the energy monitoring service. Customers wants to find a reason for the deviations for example in the electricity consumption because increased electricity consumption creates additional costs for the building owners. However, tickets for the sudden increases in energy consumptions are not currently created in the CRM and sent to the Operational and Performance Qualification team for a further handling. This is partly because the CRM is new, and it is not actively used by the Energy Specialists and partly because customer often uses external Energy Management System to monitor the building energy consumptions and reports of the energy deviations.

3.3.4 Direct sales

Direct sales in the Operational and Performance Qualification team are usually conducted on customers that already has co-operation and positive experiences working with the Operational and Performance Qualification team or other services provided by the Advisory Services. As the Operational and Performance Qualification team is still quite new, specialists must operate also in other complementary duties as there is not enough order backlog to be able to only perform the OPQ service. The complementary duties often include duties from the remote management team and from the energy management team. The positive effect is that the complementary duties can be used to recognize opportunities to promote and sell the OPQ service.

3.3.5 Direct sales by sales personnel

The OPQ service is offered to customers as part of Caverion’s service portfolio by sales personnel. The sales teams are divided regionally in Finland. It has been recognized that all regional sales teams are not aware of the OPQ service and therefore do not actively introduce the service to the potential customers.

Interviewee 2 part of the regional sales team and aware of the basic service description for the OPQ service, understands the main benefits that the service provides to the customer and knows where more information about the service can be found if needed. Interviewee 2 also states that this is not the case with other salespersons as the service is not well enough introduced to the regional sales teams.

According to interviewee 4 the company supposedly has a sales strategy but on a practical level it is difficult for a salesperson to inform the customer about all the services being provided by the company. Interviewee 4 also states that it has been noticed that salespersons are usually more oriented to sell other services provided by the company than services provided by the Advisory Services, because service provided by the Advisory Services may need more advanced technical expertise about the building technology.

The interview with a salesperson complements the above. According to interviewee 2 the Sales Plans are not currently implemented in the sales organization in any way to help the sales personnel to plan and develop their way of working in the customer interface and it may also mirror why the OPQ service is not sold actively by sales personnel.

3.3.6 Direct order by customer

In some cases, internal or external customer may ask for a quotation directly from the service providers if the customer is already familiar with the service. This would be the fastest and most efficient way to gain new orders, but it is currently not used regularly as the service is still unknown to many potential customers.

3.3.7 Contact request from website

An option to ask for quotation for the OPQ service has been added to the Caverion Finland website. The potential customer needs to fill a form with basic information about the building such as the location of the building, total area, and estimated amount of building technology equipment in the building. This has been found insufficient way to gain new orders since the order form has been found very hard to find from the website. The issue with complicated website has already been recognized company wide and for this reason the website is being currently updated.

According to interviewee 1 it is not clear if the OPQ service is currently mentioned in the company website in any other way than in one blog text that contains the calculation tool.

3.4 Customer contacting

After the lead is provided to specialist in the Operational and Performance Qualification team, the specialists contact the customer to gain the needed information of the building and the building automation system to be able to create a quotation for the service. The pricing factors for the service are the size of the building and the amount of building technology, such as heating and air conditioning units, installed in the building. These factors effect on how long it takes the specialist to check the whole building automation system from the local control room and physically check the equipment in the building.

In the customer contacting phase, it is critical to gain information about the ongoing problems at the customer building or buildings. The usual problems include that the tenants in the office buildings may have complained about the indoor environment, energy consumption is high, or the building automation system does not react as it used to or the problems in the building automation system has started to affect other aspects in the building. With enough information about the building and building equipment, the specialist can identify the occurring problems more accurately to gain a good overall picture of the currently occurring challenges in the building automation system.

The quotation for the OPQ service is sent to the customer as PDF-file through email and it is up to customer to accept or decline the quotation or ask for more information about the service if needed.

3.5 Work phase

Once the quotation has been accepted, a specialist can perform the Operational and Performance Qualification service. The service includes five different phases and most of them are done at the customer building.

The OPQ service includes:

- Interview for the property manager and the maintenance personnel about the ongoing problems in the building
- Review of the building automation system plans
- The building automation system review
- Review of the other relevant technical building equipment
- Reporting and reviewing of the final report with the customer

Typically, the work phase takes up to one work week per building, depending on the size of the building and amount of the equipment installed in the building. According to interviewee 1 the project duration is not currently actively monitored and analyzed. Although there is possibility to do so by checking registered working hours.

3.6 Follow-up phase

The final report contains a comprehensive list of ongoing problems in the customer’s building automation system. The list is reviewed with the customer in a final meeting and follow-up actions are agreed on. In some cases, the follow-up actions such as equipment repairs, or complete equipment replacements needs to be quoted to customer. The quotations are not prepared beforehand as repairs usually needs to involve the automation service which are provided by a different organization in the Caverion Finland or the customer may want to delay the repair actions until larger renovation. Caverion cannot offer repairs to all building automation system as some building automation systems are closed systems and need a dedicated software which cannot be acquired without a special permission.

3.7 Completing phase

In the completing phase the invoice is sent to the customer. There are not currently other tasks to be performed in this phase as the service is not sold as an ongoing agreement.

3.8 Key Findings from the Current State Analysis

In this sub-section the key findings from the Current State Analysis are presented as the key strengths and weaknesses. The key strengths and weaknesses are presented in below subsections with an information in which interview or workshop the key finding was discussed in. This section is finalized with a table summarizing the key strengths and weaknesses in subsection 3.8.3. The improvement ideas that have raised in the interviews are presented in section 5.

3.8.1 Key strengths of the current sales plan implementation

Although the sales plan is not currently implemented for the OPQ service there are some key strengths from where the framework for the sales plan may be built. According to interviewee 1 the Operational and Performance Qualification team has good internal sources for the leads although they are not currently efficiently utilized. Also, many interviewees 1, 2, 4 and 5 stated that the internal networks are great and customer base is huge, but sales plan is needed so that they can be utilized better. The key strengths mentioned above should be considered when creating a framework for a sales plan.

3.8.2 Key weaknesses of the current sales plan implementation

The first key weakness discussed in interviews 1, 2, 4 and 5 were that the sales strategy and plan are non-existing or not well implemented to the business or sales organizations or documented currently in any way. A conclusion can be drawn based on the interviews that the company does not currently have Sales Plans or any framework to create a Sales Plan for a service or a business organization. According to interviewee 1 and 4 the sales of the Advisory Services are not currently measured properly, and yearly sales targets has not been set. This has been also confirmed in interview 5.

As the sales strategy or the sales plan is currently not controlled or measured it is very difficult to follow a repetitive sales plan framework or justify the corrective actions and improvements. Based on the interviewee 2, 4 and 5 there might be a Sales Strategy or Sales Plans, but they are not implemented for the business organizations or discussed in any means. This was partly confirmed in interview 6. According to interviewee 6 there is a framework to create a Sales Growth Plan, but it is currently on a practice stage and only implemented for some services.

According to interviewee 1 the sales plan and the sales process is not currently controlled in any way. This leads to a point where sales efforts for the OPQ service is not done regularly and the Operational and Performance Qualification runs out of billable work from time to time as the potential leads are not reviewed regularly. It has been noticed that the current sales process does not encourage to sell as the sales is not considered as part of daily working hours and it has been stated by organizational leaders that every working hour for the OPQ service should be billable work.

The second key weakness discussed in the interviews 1, 2 and 3 were that the marketing for the OPQ service is not currently properly executed. Marketing for the OPQ service covers internal and external presentations done by the service provides, marketing material for the OPQ service, and marketing done by the company marketing organization. The internal marketing for the OPQ service is not company-wide and marketing material may not be up to date. The marketing material for the OPQ service is not clear enough for someone who does not have a technical background. Marketing the OPQ service for the customers requires some technical expertise from the salesperson as otherwise it would be hard for the salesperson to state the benefits of the service to customers but when the salesperson understands the basic benefit of the OPQ service and can explain the benefits of the service to the customer it is more likely the customer is willing to ask for the quotation.

The third key weakness revealed in the interview is the inadequate implementation of the Sales Strategy in the business organizations. Interviewee 4 and 5 states that if the company has a sales strategy it is poorly or not at all implemented to business organizations. The issue was confirmed in interview 6. According to interviewee 6 the company is currently not using any specific Sales Strategy beside the Company Strategy. The implementation of the Sales Strategy has been practiced in 2020. According to interviewee 6 the Sales Strategies will be implemented in some form in the future.

3.8.3 Summary of the Key Strengths and Weaknesses

In this subsection the key strengths and weaknesses are presented in table format.

The most critical weaknesses recognized in the Current State Analysis are the poor implementation of the Sales Strategy and the Sales Plans in Business Organizations. In below table 2 the key strengths are presented with an information in which interview the key strength was discussed. Key strengths are not in any priority order as they are considered equally important for the process.

Table 2. Summary of the Key Strengths and Weaknesses.

Interviewee	**Topic, description**	**Category**
Key Strengths		
Interviewee 1, Interviewee 4	Good internal sources for the leads	Sales
Interviewee 1, Interviewee 2, Interviewee 4, Interviewee 5	Great internal networks	Sales
Interviewee 1, Interviewee 2, Interviewee 4	Huge customer base	Sales
Key Weaknesses		
Interviewee 1, Interviewee 2, Interviewee 4	The Sales Plans are non-existing or not well implemented throughout the company.	Sales
Interviewee 1, Interviewee 4	The current sales plan is not measurable.	Sales
Interviewee 1, Interviewee 2, Interviewee 3	Marketing for the OPQ service is not properly executed.	Sales, Marketing
Interviewee 2, Interviewee 4 Interviewee 6	The Sales Strategy is not implemented to business organizations	Sales

This thesis focuses on building a framework for a measurable sales plan that utilizes the Sales Strategy, the key strengths recognized in Current State Analysis and the already created Sales Growth Plan.

In following chapter 4. the existing knowledge and best practices for creating a measurable Framework for the Sales Plan is introduced.

4 Existing Knowledge and Best Practice on Sales Plan Framework

In this section best practices for the sales plan framework from literature are introduced. The literature research focuses on investigating how the organization can create an effective sales plan framework to support the sales and the marketing of the services.

4.1 The planning process

In this subsection the sales and marketing planning process created by Jobber et al. (2019: 51) is introduced. The planning process by Jobber et al. (2019: 51) is selected as a main body for the literature research as it is aligning with phasing of the current Sales Plan process introduced in section 3.1. To create a strong understanding for each step of the planning process also other relevant literature is examined to provide support and different perspective to achieve a comprehensive understanding of the sales planning process.

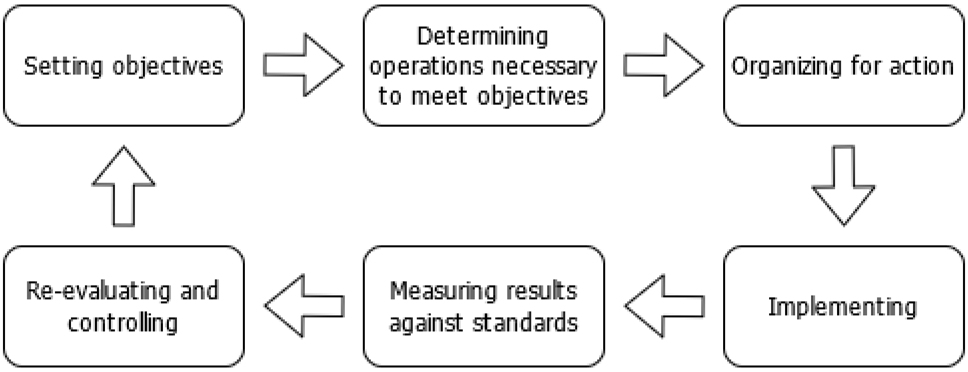

Figure 6. The Planning Process. Jobber et al. 2019

According to Jobber et al. (2019: 51) the planning process is required to be able to implement the strategies to meet the given objectives. The planning process of a business organization consists of different levels of accuracy, from general to specific. Levels of accuracy can be described with acronym MOST which stands for mission, objective, strategy, and tactics.

Friend and Zehle (2004: 247) states that the business plan does not only serve the business organization, but it also works as a motivation to the employees working in the organization. With a clear business plan the employees can understand how their contribution can have an effect for the success of the organization. Employees with a good understanding of the business plan can provide valuable feedback and improvement ideas for the processes and services provided by the organization. When the employees understand the company vision, mission and business objectives employees can communicate them forward to the wide community of customers, suppliers, and other important business partners.

In the next subsections each step of the planning process is discussed.

4.2 The Objective Setting and determining the necessary operations

In this subsection the objective setting and the needed operations to meet the objectives in a business organization are discussed. Any business organization must have set objectives to be able to measure the results and justify the needed new resources or improvement in their processes.

Jobber et al. (2019: 65) states that in order for the business organization to be able to set effective objectives for the sales plan, the key decision makers must first perform a set of internal and external analyses. Determining the market and sales potential is done as the last part of analyzing phase of the planning process. Below in figure 7, the analysis process to set the objectives is presented.

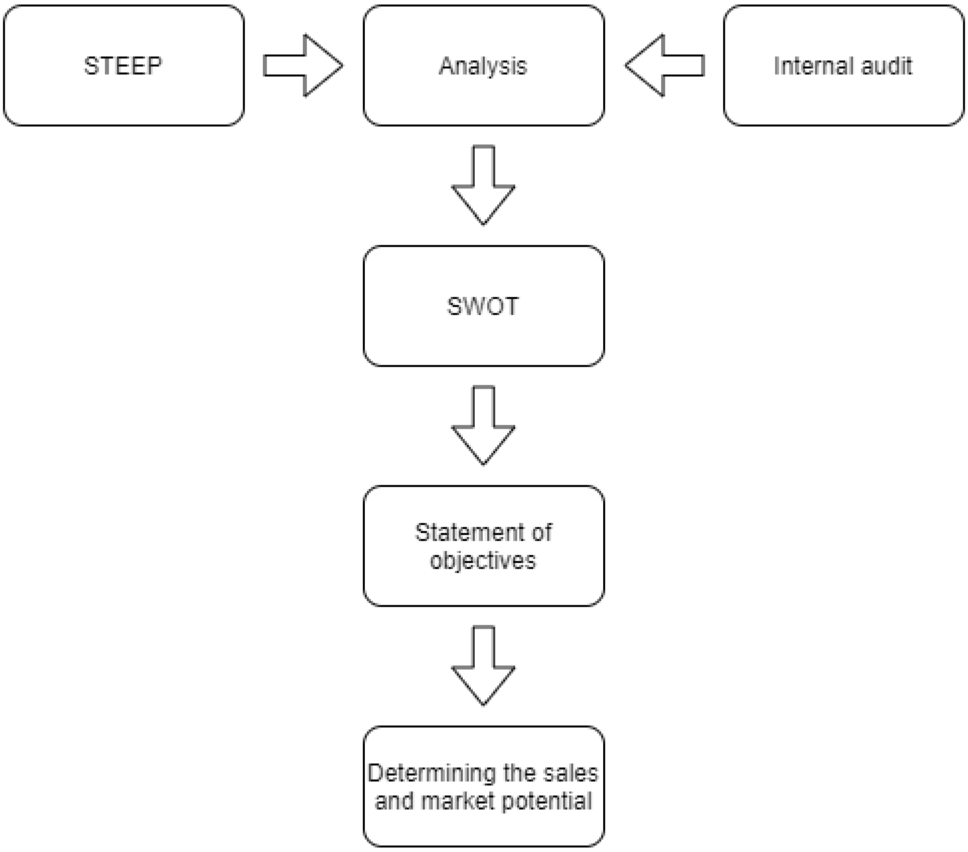

Figure 7. Analysis process extracted from market planning process by Jobber et al. 2019

4.2.1 Internal and external analysis

In this subsection the internal and external analysis (SWOT) is discussed.

Organizations must perform internal and external analyses in order to have proper understanding of the internal situation of the organization and the current external market situation. Internal and external analysis is carried out before the objectives for the sales plan are set as the objectives are based on the results of the performed analyses.

According to Jobber et al. (2019: 52) when preparing a market plan company usually performs external and internal audits to analyze the company's situation in the market. Market situation can be analyzed internally and externally by considering internal strengths and weaknesses and external opportunities and threats. This is known as a SWOT analysis.

According to Friend and Zehle (2004) the SWOT analysis allows the decision makers to investigate strengths and weaknesses in the context of the opportunities and strengths. Friend and Zehle (2004) states that SWOT analysis is valuable for organizations as it generates discussion between key stakeholders in the business without too many restrictions.

Bensoussan et al. (2013) states that a SWOT analysis enables stakeholders to better understand the factors that are affecting the performance of the company. The analysis consists of internal component (strengths and weaknesses) and external component (opportunities and threats). According to Bensoussan et al. (2013) SWOT analysis enables the stakeholders of the company to understand the strategic issues concerning the business. Strategic issues are uncertainties and risky decisions that exist inside the company or in the market environment in which the company is doing business.

They key strength of SWOT analysis according to Bensoussan et al. (2013) is that the SWOT analysis can help organizations to understand and manage the business environment. The SWOT analysis also can be used as a tool to provide insight if the organization has been successful carrying out the strategy or not. Friend and Zehle (2004) states that with a well-prepared SWOT analysis organization can gain sustainable competitive advantage in the market. To gain more information about competitors SWOT analysis should also be conducted on the key competitors in the market.

According to Bensoussan et al. (2013) SWOT analysis may be carried out effectively when the analysis is performed by following three steps. The three steps are presented below:

1. Listing and evaluating the strengths, weaknesses, opportunities, and threats.

2. Analysing and ranking the factors effecting the strengths, weaknesses, opportunities, and threats.

3. Recognizing a strategic fit between the identified strengths, weaknesses, opportunities, and threats and developing a strategy to overcome or improve the matches.

In figure 8, below the basic framework for the SWOT analysis is presented. The arrows in figure 8 represent recognizing the strategic fit between each factor.

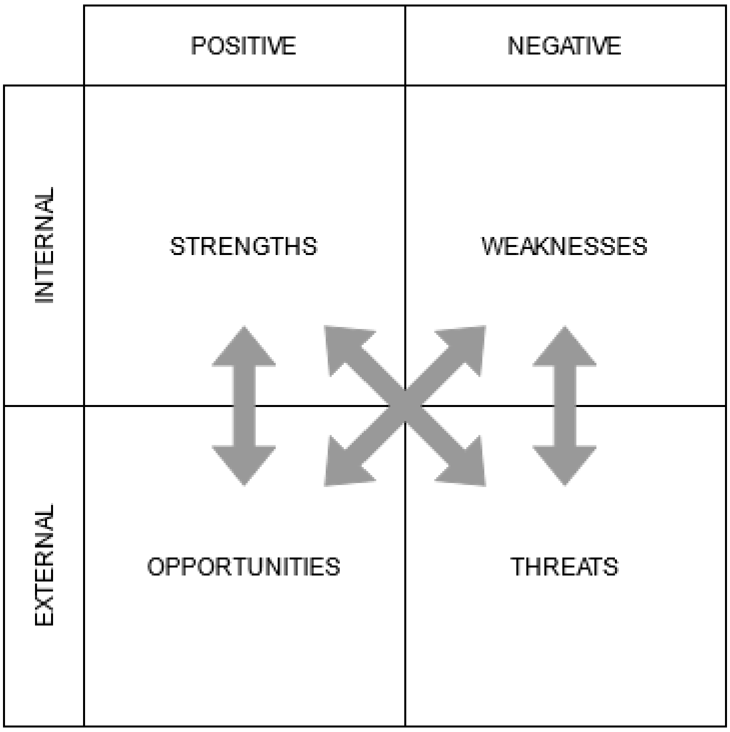

Figure 8. SWOT analysis adapted from Friend and Zehle (2004).

4.2.2 Macro-external analysis (STEEP)

In this subsection the macro-external analyses are discussed.

The external audit should also include the analysis of macro-external factors which include subcategories such as political, economic, social, and technological dimensions (PEST). The macro-external analysis can be used as complementary analysis to gain a better understanding of the business environment when analysing the business with internal and external analysis.

According to Bensoussan et al. (2013) the primary purpose of subcategories in analysis is to take all major aspect of the general environment into consideration when preparing analysis. Jobber et al. (2019: 54) states PEST analysis and its variations can be used as a powerful tool to analyze the external opportunities and threats in the market.

Friend and Zehle (2004) states that in order to perform comprehensive external analysis organizations need to bring together a workshop with key stakeholders that has different types of knowledge and expertise. The workshop should start with clearly agreeing and defining the objectives for the organization. Followed by this the stakeholders must bring together a comprehensive idea of all the factors affecting these objectives in the business environment.

Another variation presented by Bensousssan et al. (2013) is STEEP analysis. It has the same concept as the PEST analysis but with an added ecological aspect. According to Bensoussan et al. (2013) the importance of organizations environmental situation in strategy analysis and decision making is recognized by many organizations but often does not affect strategic decision making. This can be due to uncertainty about operating environment, or the organization may think the environment is too prone to fast changes.

The key strengths in STEEP and other similar analysis are according to Bensoussan et al. (2013) it leads organizations to thinking also about the long-term activities and effects in business instead of just the short-term. Successful STEEP analysis creates a link between short-term and long-term activities. Bensoussan et al. (2013) states that well performed environmental analysis is known to affect positively on competitive performance when performed correctly.

According to Bensoussan et al. (2013) there is evidence collected on empirical studies that STEEP analysis may be difficult to perform effectively over time. There are also other kind of problems affecting the performance of the environmental analysis. The known weaknesses of a STEEP analysis can be categorized into six categories:

- Interpretation. Decision makers in organization have issues defining the environment in which the organization is operating.

- Inaccuracy and uncertainty. Decision makers have a lack of faith in the output of the analysis. This can be due to uncertainties when defining the environmental issues.

- Short term orientation. Decision makers have a lack of faith in the speculative results, and they may feel like the money is spent better if the organization focuses only on the short-term issues.

- Lack of acceptance. Decision makers do not accept the value of the environmental analysis which can be due multiple reasons such as the management not understanding the value of environmental analysis or unwillingness to try new methods in the business forecasting.

- Misperceptions. Decision makers do not have wide enough scope when analyzing the environment or the perceptions the decision makers are not correct.

- Diversified businesses. Decision makers lack the experience to make environmental analysis which is very common in multinational environmental analyses.

Bensoussan et al. (2013) presents five-step process to define each segment in the STEEP analysis. The five steps are presented and briefly explained below:

1. Create understanding for the segment of the environment being analyzed. Decision makers must understand the market environment they are operating in.

2. Create understanding for the interrelationships between the current trends. Decision makers must understand the current trends in the market they are operating in and how the current trends are affecting with each other.

3. Create understanding about the relations between the current trends and the current issues. Decision makers must understand the current issues in their operating environment and how the current issues may be affecting the current trends.

4. Create understanding of the possible future direction for the current issues. Decision makers must understand how the current issues may be forming the industry in the future.

In figure 9, below the STEEP analysis has been presented in the same format as SWOT analysis in figure 8.

	OPPORTUNITIES	THREATS
S	Social opportunities	Social threats
T	Technological opportunities	Technological threats
E	Economic opportunities	Economic threats
E	Egological opportunities	Egological threats
P	Political opportunities	Political threats

Figure 9. STEEP analysis

In the next subsection the objective setting for the sales plan is discussed.

4.2.3 Setting the objectives

According to Jobber et al. (2019: 57) the company can have several different kinds of objectives which aim at different type of results. Objectives are needed in many areas which may be, depending on business area, financial, marketing related, supporting or corporate objectives. Each business area usually requires different type of objectives. For example, marketing activities require other kind of objectives than production or sales related activities. What each objective has in common is that all objectives require own strategy so that they can be achieved.

Jobber et al. (2019: 57) states that objectives should be consistent and unambiguously and quantitively expressed and objectives should contain a timeframe in which the objective should be achieved. Such objectives can be described with acronym SMART which is used to describe the following requirements; specific, measurable, achievable, realistic and time related. Jobber et al. (2019) points out that as the objectives should be time related, the time range for objectives to be completed can be sometimes challenging to determine. Common time range category used for objectives contains three different ranges which are short range objectives, intermediate range objectives and long-range objectives. It is up to stakeholders at the company to decide how the actual time for each time range is determined. Although the objectives are from different time range category, each objective should be linked to each other, because to achieve long term objective, first the short term and intermediate term objectives are needed to be achieved.

The necessary criteria for setting the objectives, described by Jobber et al. (2019: 57), are presented below:

1. Objectives focus on results

2. Measures are set against the objectives

3. Each objective contains a single theme if possible

4. Resources to meet the objectives should be realistic

5. Objectives are integral to corporate objectives and align with other objectives

To create an effective sales plan, organization must have set sales targets that follow principles of good objectives setting and are based on internal and external analyses. According to Cuevas et al. (2016) there are several purposes to use sales targets:

- The sales targets are used to evaluate the sales performance. In order to evaluate the sales performance, the set sales targets must be realistic and based on accurate sales forecasts.

- The sales targets are used as a motivation for the people making the sales in the organization. In order to use the sales targets as a motivator for the people making the sales in the organization, the sales target must be set so that the targets are challenging but achievable.

- The sales targets are used to calculate compensation for the people making the sales in the organization. To use sales targets as a way to calculate compensation for the people making the sales in the organization, the set targets must be carefully evaluated in order to avoid undesirable behavior associated on trying to gain maximum benefit from the system.

- The sales targets can be used to control specific activities in the organization. The sales targets may be set to pursue some type of desired situation such as additional sales for some type of service or more sales on some accounts.

There are several different types of sales targets. According to Cuevas et al. (2016) the overall sales targets can be classified into qualitative sales targets and quantitative sales targets.

The quantitative sales targets include several different types of targets that are mostly economic based. Such targets are based usually on sales volumes, values, margin, expenses, and other economic based values.

The qualitative sales targets are based on the values such as time, productivity, efficiency, and customer satisfaction. Such targets can be related to actions such as providing technical advices to customers, service to existing customers, collecting leads, and contacting new customers.

The quantitative or qualitative sales targets should not be used alone as sales work often requires activities from quantitative and qualitative sales target categories. By combining sales targets from both sales target categories to overall sales target framework managers can better recognize deficiencies in the sales plan and monitor the overall picture of the sales.

Cuevas et al. (2016) also mentions that set sales targets must be monitored and updated on regular basis in order to have sales targets that are effective, motivational and based on current market situation.

4.2.4 Forecasting and determining the sales and market potential

According to Jobber et al. (2019: 58) the definition of market potential is the highest possible number of sales available in the whole market for specific service during the specific time range. The definition of sales potential is the maximum available market share what the company could be able to achieve. In this subsection the forecasting and determination of the sales and market potential is discussed.

The basic principle of the forecasting is to collect and analyze data from different type of sources and make decisions based on the analysis of collected data. In figure 10 below the basic principle of the sales forecasting is presented.

Figure 10. The basic principle of forecasting

According to Cuevas et al. (2016) forecasting the sales requires three-part forecasting. The first part of the forecasting is the general forecasting of economic and business conditions, which is an estimate of the total level of demand based on the number of consumers, their willingness to purchase and their ability to purchase.

The second part of the forecasting is the industry sales forecasting, which presents the immediate market potential by estimating the past, current, and future activities of the competitors in the same industry.

The third part of the forecasting is the company sales forecasting, which provide input for the financial statements for the planned marketing efforts. Cuevas et al. emphasizes that the company sales forecast must be based on planned marketing efforts and not the other way around.

According to Friend and Zehle. (2004) the marketing plan has two important roles: it provides the basis for the sales forecast and it can be used to demonstrate the existing still unmet demand for the decision makers. The sales forecast has a key role in business planning as it drives the marketing planning model, which effects all other variables in business planning.

According to Cuevas et al. (2016) there are different methods for the sales forecasting. Sales forecast can be executed by using customer knowledge and market research. However too positive or negative customers may distort the results and the sales forecast becomes inaccurate. Executing market research for a large market area is also expensive and the cost-efficiency for the sales forecast decreases.

Another method introduced by Cuevas et al. (2016) for the sales forecasting is using a consensus approach which is usually executed by salespersons, experts, or a panel of executives depending on who has the best knowledge about the customer. The consensus approach offers some advantages such as persons performing the forecasting process identify opportunities and creates an understanding of the trends, in other words, creates strategic understanding of the customer and the market. However, there are some disadvantages when performing the consensus approach such as time consumption if there are lots of competitors or products, accuracy between individuals performing the forecasting process and limitations in expertise concerning the persons performing the forecasting process.

According to Cuevas et al. (2016) a simpler method to execute the sales forecast is to use objective techniques which can be categorized into time series methods and casual methods.

According to Friend and Zehle (2004) the time series methods rely on quantitative time series data that can be used to detect and identify the repetitive events such as selling cycles, seasonality, and trends. The basic idea of time series data analysis is to recognize patterns in the data set. It must be considered that there are always errors in the data set and it needs to be filtered out before the data can be used to forecast the sales.

According to Cuevas et al. (2016) the casual method for forecasting is predicting dependent variables from independent variables. If the dependent variables such as sales can be predicted with sufficient accuracy from independent variables such as trends, prices and marketing efforts, the casual method is a relatively simple solution to forecast the sales. However, if the independent variable cannot be accurately estimated casual method loses its potential of use as the estimation is no longer accurate.

Although the forecasts are always estimations and never entirely true there are some rules to ensure the sales forecasts are as accurate as possible. According to Cuevas et al. (2016) there are several rules for successful sales forecasting. The rules for sales forecasting are introduced below:

1. Objective and subjective data must be separated. Objective data is the true facts such as past sales and other verified data. Subjective data needs to be questioned and clearly stated who collected the data, why and how.

2. Keeping the sales forecast as simple as possible with using only the necessary variables when making the sales forecast. Complex forecasts are not usually cost-efficient and therefore should be avoided. Variables such as past sales, trends and seasonal and cyclical factors are good examples for sufficient variables to perform a cost-efficient sales forecast.

3. When preparing the sales forecast only the most reliable general economic and industry indictors should be used.

4. Appropriate time relationships such as lag effects should be identified when making the sales forecast.

5. Only variables that can be forecasted should be used as the sales forecast should rely only on simple variables.

In the next subsection the needed preparations for organizing the key performers in the organization for action and implementing the operational plan is discussed.

4.3 Organizing for action and implementing

Once the objectives, the internal and external operation environment and forecasts for the sales organization are clear and approved by the management, the stakeholders of the organization must prepare an action plan on how the given objectives are going to be achieved in given timeframe and what kind of strategies are used to achieve the objectives. In this subsection the action plan and implementation of the action plan is discussed.

According to Jobber et al. (2019) the sales and marketing plans should not be competing plans, instead they should complete each other. To be able to create an effective framework for sales plan for the service that is being sold and marketed by the personnel performing the service, mix of marketing and sales activities should be combined to create an action plan that can boost the sales and raise the awareness of the service.

Some of the given sales or marketing objectives should not be accomplished at once as the objectives can be relatively broad. In this kind of situations, the given objectives must be divided to hierarchy of sub-objectives. Friend and Zehle (2004) states that the marketing plan contains guidelines for the implementation of the marketing objectives. According to McDonald and Wilson (2011) when implementing the marketing objectives in the company, the given objectives are divided into sub-objectives that has more detailed strategies and action statements. It is important that these sub-objectives reflect the given budgets and forecasts. All sub-objectives should relate to the main objectives. This means that to complete the main objective all sub-objectives must first be completed. It should also be remembered that if the main objectives are based on budgeting, every budget expenditure must be directly related to financial objectives. For example, if the main objective is to raise the awareness of the service, the budget expenditures, such as working hours, to presenting the service to potential customers must be traceable back to the main objective.

The organization decision makers must give a timeframe for the objectives to be completed. the McDonald and Wilson (2011) introduces a table format for the one-year marketing plan documentation. The one-year marketing plan consists of seven forms. Each form is described below:

1. A list of main objectives and main strategies. The main objectives form includes a list of the main objectives with the volume or value and gross margin for each objective. The current volume or value, volume, or value last year and volume or value next year should be presented with a brief commentary. The main strategies form includes a list of the main strategies with an estimation and brief commentary.

2. A list of sub-objectives. To complete each sub-objective there should be presented a strategy and action plan. The action plan for each sub-objective should cover details, timing, responsibilities, and costs.

3. A list of the marketing activities with cost for each marketing activities. The marketing activities covers such activities as working hours, trainings, market research etc.

4. The risk assessment for the assumptions on which the one-year plan is created on. It is critical to analyze and evaluate the possibilities of not meeting the given objectives in the one-year plan. The risk assessment form presented by McDonald and Wilson (2011) includes the critical assumptions on which the one-year plan is based on, the financial consequences if the objectives assumptions are true, how the assumptions are measured and what action are to be taken to ensure the forecasted profit for the year will remain intact if the assumptions are not true.

5. A list of the operating result and financial ratios. Each organization has their own methods and formats for measuring the financial ratios and results. However, this listing should contain costs, results, and ratios.

6. A list of key activities that summarizes the activities and the start and the ending date for each activity.

7. In case there is some information that needs to be included in the one-year plan, the organization can add additional forms to the one-year plan. This kind of forms can be related for example to the activities in the sales process.

4.4 Measuring results against standards, re-evaluating, and controlling

In this section the result measuring and the standards for result measuring and evaluation process is discussed.

According to Jobber et al. (2019: 422) the performance evaluation process can be performed in five steps. The first two steps have already been discussed earlier in section 4. The first step of the evaluation process is to set the objectives which are being sought the be achieved. The objective setting is discussed in section 4.2.3.

The second step of the evaluation process presented by Jobber et al. (2019) is the strategy setting process. To achieve the objectives, the strategies, and tactics to achieve the objectives must be set. The strategy determination and action plan setting are discussed in section 4.3.

The third step of the evaluation process presented by Jobber et al. (2019) is to set the performance standards for the process and the personnel performing the process. According to Jobber et al. (2019) the performance standards are set of standards that provide fair assessment point in which the performance will be compared to. The standard measuring methods should be used as it is considered as a fair method to evaluate and compare the performance of the personnel performing the sales.

Cuevas et al. (2016) states that sales performance measurement depends on the nature of the sales processes, maturity of the organization and internal requirements of the organization. Sales performance measuring is more complex than just collecting and measuring sales data. There are several factors that may make the sales performance challenging, such factors are strict performance measurements given on personnel performing the sales, failure to achieve the given performance objectives, inter-connected and subjective performance objectives. The problematic factors may be avoided by carefully planning a fair performance measurement system that uses performance standards.

The fourth step of the evaluation process presented by Jobber et al. (2019) is to measure the results against the set performance standards. The measures are dived into quantitative and qualitative measures of performance. Data for the quantitative measures can be relative easily collected and calculated. By analyzing the quantitative measures, below standard sales performance can be recognized. The qualitative measures provide more subjective dimensions for performance analysis which may not be easily measured and analyzed. The qualitative measures cover subjective dimensions such as customer or service knowledge, attitude towards the company and to customers, sales skills such as presentation preparation, cooperation on team or organizational level. In order to effectively and comprehensively evaluating the personnel and the processes, both the qualitative and quantitative evaluation measures should be used as evaluation methods tend to be inter-connected and poor performance in some areas may reveal strengths in other areas of performance.

According to Seidman D. (2012: 463-464) any objective that is going to be measured by evaluating performance of person performing the sales requires some motivational actions and recognition as part of the strategy. When creating a framework which aims to improve the performance, having too many objectives should be avoided because it may lead to failure. Only few areas should be improved at once.

The last step the of the evaluation process presented by Jobber et al. (2019) is to take action to improve the performance based on the results. In figure 11. below the five-step evaluation process by Jobber et al. (2019) is presented.

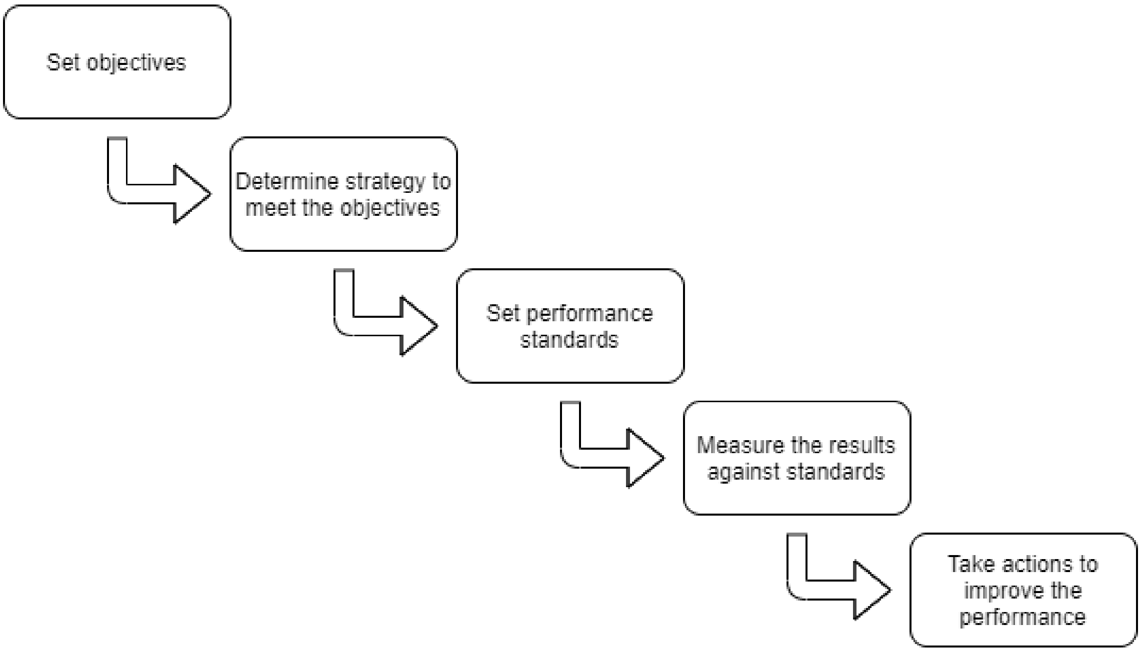

Figure 11. Evaluation process. Jobber et al. 2019

In next section the Conceptual framework for this thesis is discussed.

4.5 Conceptual Framework of This Thesis

In this section the Conceptual Framework for this Thesis is discussed. The literature for existing knowledge on sales and marketing planning was researched. The results of the literature research provided a set of processes operating on different levels of the main process presented in Figure 6 and tools to build an effective sales plan framework for an organization that is handling the sales, marketing and performing of a service. The Conceptual Framework built for this thesis contains a key process (Jobber et al. 2016) which is presented with highlighted arrows as shown in Figure 12 below.

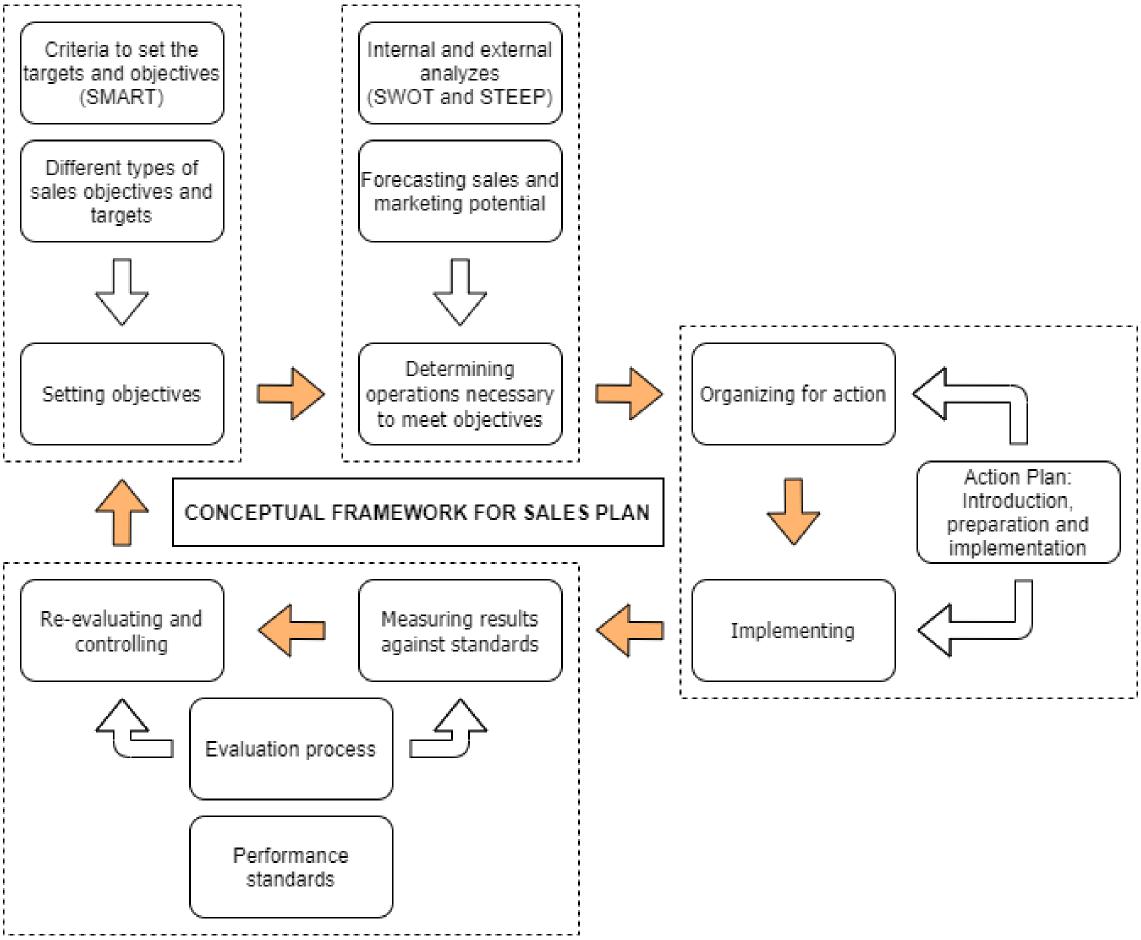

Figure 12. The Conceptual Framework

The key process presented by Jobber et al. 2016 in the Conceptual Framework consists of six steps which are setting objectives, determining operations necessary to meet objectives, organizing for action, implementing, measuring results against standards and finally re-evaluating and controlling. Each step of the key process contains description of tools and methods used in each step of the key process.

In the first step of the Conceptual Framework the objective setting is discussed. In objective setting the criteria to set the targets and objectives and different types of sales objectives and targets are discussed. The literature review to understand the best practices for the objective setting was done by studying the methods presented in Selling and Sales Management written by Jobber et al. (2019) and Sales Management Strategy, Process and Practice written by Cuevas et al. (2016).

The second step of the Conceptual Framework discusses the operations necessary to meet the objectives. The objectives are based on forecasting and internal and external analyses. The internal and externals factors can be analyzed effectively by combining STEEP and SWOT analyzing methods. The literature review to understand the best practices for the objective setting was done by studying the internal and external analyzing methods presented by Jobber et al. (2019), Friend and Zehle (2004) and Bensoussan et al. (2013). The best practices for forecasting of the market and sales potential have been drawn from the literature presented by Cuevas et al (2016) and Friend and Zehle (2004).

The third and fourth step of the Conceptual Framework discusses organizing for action and implementing. In this step the action plan presented by McDonald and Wilson (2011) and Friend and Zehle (2004) is discussed.

The fifth and sixth step discusses measuring, measuring standards, re-evaluating and controlling. The evaluation process presented by Jobber et al. (2016) and the literature for performance standards (Jobber et al. 2016) is reviewed and discussed with in-depth findings from literature presented by Cuevas et al. (2016) and Seidman D. (2012).

In section 5 the proposed Sales Plan Framework is discussed. The proposed Sales Plan Framework has been built by using the Conceptual Framework introduced above coupled with the key strengths and weaknesses identified in the Current State Analysis presented in section 3.8.

5 Building the initial Proposal of the Sales Plan Framework

In this section the initial proposal for the Sales Plan Framework is built using Data 2 collected in a workshop held for the key stakeholders and an additional interview held for a key stakeholder handling the sales in the case company. The results of Current State Analysis and the Conceptual Framework of the thesis are used as a basis to build the initial proposal.

5.1 Overview of the Proposal Building Stage

Since the objective of the thesis is to create a Sales Plan Framework for the Operational and Performance Qualification team, this proposal building section covers the process of building the initial proposal for the outcome of the thesis which is the Sales Plan Framework for the Operational and Performance Qualification team. This section discusses the results of the workshop and interview conducted to collect Data 2 for the proposal building. The goal of this is to provide an initial co-created proposal for the outcome of the thesis that matches with the given objective.

The Current State Analysis revealed that documented and well-prepared Sales Plan Frameworks are currently not used throughout the company. The current Sales Plan of the Operational and Performance Qualification team is not measurable and the marketing of the OPQ service provided by Operational and Performance Qualification team is not properly executed or planned. Best practices for developing a Sales Plan Framework were found from the relevant literature discussing the sales, the sales management, and the marketing.

The documented and measurable Sales Plan framework aims to help the Operational and Performance Qualification team to generate more sales by raising the hit-rate and improving the service with valuable information generated by measuring the sales and the service performance.

The first step of building the initial proposal for Sales Plan Framework was to prepare a presentation for the key stakeholders. The presentation consisted of four main parts. In the first part the problem and the objective of the thesis was presented so that key stakeholders can recall the subject of the thesis. The second part of the presentation discussed the current Sales Plan and found strengths and weaknesses of the current Sales Plan revealed in the Current State Analysis. The third part discussed the Conceptual

Framework of the thesis and best practices found in the literature. In the fourth part of the presentation the initial proposal for the Sales Plan Framework were discussed. In this part the main steps, tools and methods of the proposed initial Sales Plan Framework were presented to the stakeholders.

The second step of building the initial proposal was to organize a workshop for the key stakeholders. The comments, development ideas and critique about the initial proposal for the Sales Plan Framework acquired during the workshop was recorded as part of Data 2. The third part of building the proposal was to conduct an additional interview for a key stakeholder handling the sales in the case company. The meaning of the additional interview was to gain more feedback, vision, and development ideas from a sales and marketing professional. The interview followed the same principle as the workshop held for the key stakeholders and the presentation for the interview was the same as presented in the workshop. The input gain in the interview concluded the collection of Data 2.

5.2 Findings of Data Collection 2

In this section the input from the key stakeholders and the sales and marketing professional to the initial proposal for the Sales Plan framework is presented. The input consists of suggestions and advice on how the initial proposed Sales Plan framework could be improved and made more effective.

Below in table 3, the input from the Key Stakeholders and sales and marketing professional is presented. Table 3 is divided into three sections, the first column of the table presents the key focus area from the main steps of the Conceptual Framework that the improvement suggestion affects, the second column presents the category of the input and the last column presents the description for the improvement suggestion.

Table 3. Key stakeholder suggestion for proposal building (Data 2)

	Key focus area from the main steps of CF	**Suggestions from stakeholders**	**Description of the suggestion**
Workshop with the key stakeholders			
1	Measurement and evaluation	Mid-term evaluation	The Unit Manager suggests that in addition to evaluation being added to Sales Plan Framework, also mid-term evaluation should be added to ensure continuous evaluation and development of the services.
2	Measurement and evaluation	Mid-term sales meetings	The Unit Manager emphasizes that key stakeholders performing the sales should organize sales meetings more often than once in a Sales Plan Framework cycle.
3	External analysis	Customer needs analysis	The Unit Manager emphasizes that analyzing the customer needs is very important part of the external analysis and should be mentioned in the Sales Plan Framework.
Workshop with the Sales and Marketing professional			
4	External analysis	Customer needs analysis	The Key Account Manager emphasizes the need of customer analysis as part of the external analysis. Such questions as why customer needs the service, why customer orders the service and what customer gets when ordering the service should be considered.
5	Re-evaluating	Sales Plan and service development	The Key Account Manager emphasizes that when developing and improving the Sales Plan and the service the key stakeholders must be able to explain how and why the Sales Plan or the service is going to be improved and what are the needed investments. Also, when improving the service what is the additional value that the improvements will provide from customer point of view.
6	External analysis	Building owner analysis	The Key Account Manager suggests including an additional analysis to Sales Plan that analyzes what kind of building owners are more likely to order the services being provided.
7	External analysis	Customer organization analysis	The Key Account Manager suggests including an additional analysis to Sales Plan that analyzes the different types of stakeholders in customer organization that are most likely to order the services being provided.
8	General	Introduction of the Sales Plan	The Key Account Manager suggests including an introduction for the service, salesperson or the customer to Sales Plan depending on for which type of purpose the Sales Plan is created. This helps managers to understand the purpose and goal of the Sales Plan.

The input of Data 2 collected in the workshops consists of valuable improvement ideas and additional depth into the proposed Sales Plan framework. The improvement ideas and additional depth to the initial proposal of the Sales Plan Framework is presented with red dashed lines so that the improved areas can be separated from the first draft of the

Sales Plan Framework. The improvement suggestions are considered adding value to the Sales Plan Framework and therefore will be added to the final version of the Sales Plan Framework. The initial proposal for the Sales Plan Framework is presented in section 5.3.

5.3 Proposal Draft for the Sales Plan Framework

In this section the initial proposal for Sales Plan Framework is presented with a description for each step of the framework. The overall steps of the Sales Plan Framework are presented in figure 13 and the detailed Sales Plan Framework is presented in figure 14.

The main steps of the proposed Sales Plan Framework follow the same principles as presented in the Conceptual Framework of this study. The Conceptual Framework of this study can be found in Section 4 in Figure 12. Below in figure 13, the six main steps of the initial proposal for Sales Plan Framework are presented.

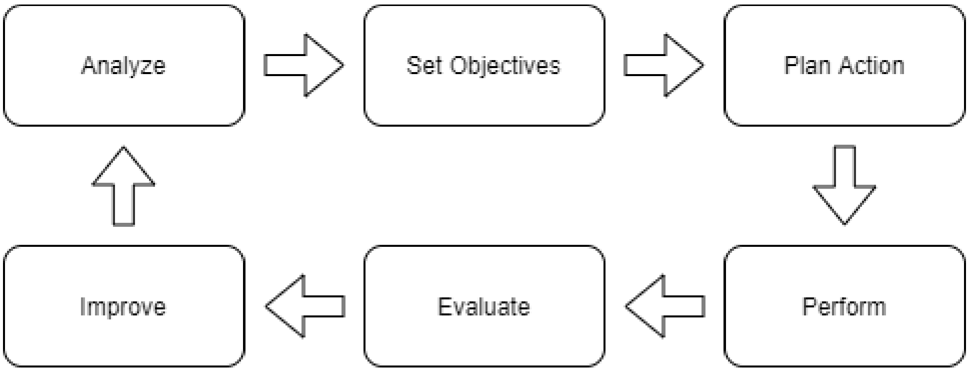

Figure 13. Sales Plan Framework draft

In the detailed version of the Sales Plan Framework the tools and methods for building the Sales Plan are presented. Each step of the Sales Plan Framework is discussed in subsections 5.3.1 – 5.3.6. Below in figure 14 the detailed Sales Plan Framework proposal is presented. The red dashed line represents the improvement suggestion collected as Data 2 in the workshop for key stakeholders and in the interview held for the Sales and Marketing professional.

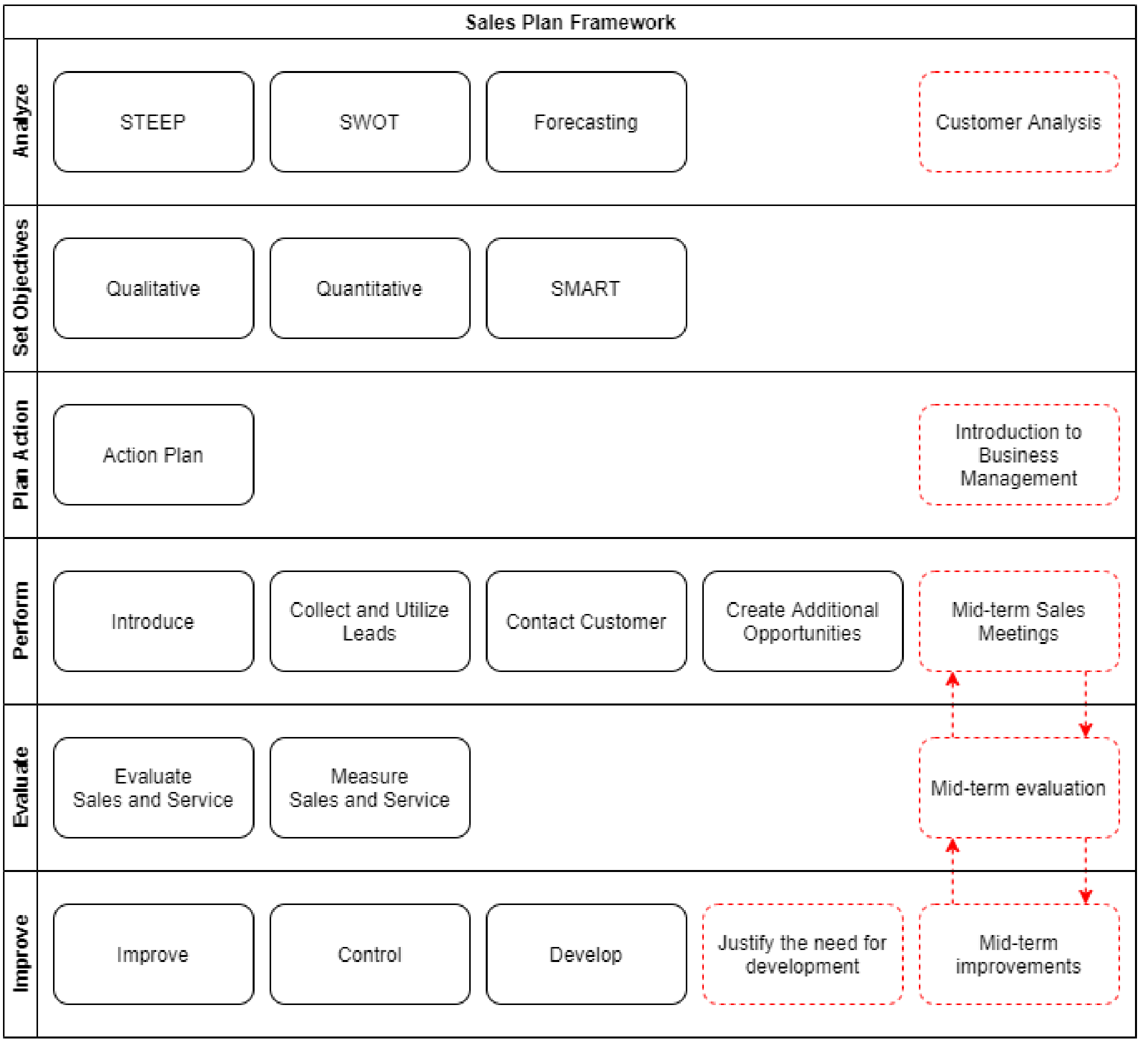

Figure 14. Detailed Sales Plan Framework draft

In next sub sections each step of the Sales Plan Framework is discussed.

5.3.1 Analyze

In the Current State Analysis, the inefficiency of the marketing of the Operational and Performance Qualification was recognized as one of the key weaknesses. In order to execute the marketing properly it is very important to know the potential of the service being sold, know the situation of the market where the service is being sold and to knowledge the competition of similar service in the market.

As presented in the Conceptual Framework of this thesis, a set of internal and external analyses should be performed in order to gain an overall understanding of the service being provided and the market where the service is being provided. As discussed in the section 4.2.1, the SWOT analysis is an effective way to perform the internal and external analysis as the analysis discusses the internal strengths and weaknesses and the external opportunities and threats. The external analysis can be deepened by analyzing the macro-external factors with tools intended for that purpose. By using the tool such as the STEEP analysis presented in section 4.2.2 the macro-external factors can be identified effectively. The STEEP analysis offers a wide enough coverage of the market as the social, technological, economic, ecologic, and political factors are analyzed. The sales of the Operational and Performance Qualification service can be justified with different factors of the macro-external analysis such as ecological factor as the energy efficiency of the buildings is very important for many building owners. It is important to reserve the needed time to prepare a comprehensive analysis for the internal and external factors. The known risks affecting the performance of the environmental analysis, presented in section 4.2.2, must be recognized to be able to perform effective environmental analyses.

The forecasting of the Sales is done after the internal and external analyses. As discussed in the section 4.2.4, the forecasting will define the highest possible number of sales available in the whole market for the service during the one cycle of the Sales Plan. The forecasting will also define the maximum available market share what the team could be able to achieve. One of the identified key weaknesses in the Current State Analysis of this thesis was that the current Sales Plan is not measurable. The forecasting of the sales provides a reference base on which the measuring standards can be based on.

The Customer needs analysis, customer organization analysis and building owner analysis was discussed in the workshops for Data 2. The Unit Manager and the Key Account Manager suggested that the analysis concerning the customer, customer organization and the customer building portfolio should be added to Sales Plan Framework. By listening to the customer needs and by analyzing the customer it would be easier to key stakeholders providing the service to understand what kind of services the customer needs, who in the customer organization is most willing to purchase technical services and to which type of buildings the service is most likely needed. The suggestions related to customer analysis can be found in the table 3 on rows 3, 4, 6 and 7. The low hit-rate for the quotations was identified as one of the key weaknesses in the Current Stat Analysis. By analyzing the market and the customer and by offering the service with description corresponding to customer needs, it is more likely that the customer will order the service.

Once the required internal and external analyses for the Sales Plan have been prepared and the forecasting of the sales is completed, the key stakeholders can move to the next step of the Sales Planning Process which is the objective setting.

5.3.2 Set Objectives

Differentiating from the Conceptual Framework presented in figure 12 in section 4 the internal and external analyzing is done before the objective setting. This is because the objectives for the Sales Plan Framework will be set based on the internal and external analysis, the forecasting of the sales and the possible customer analyses. This way the building of the Sales Plan will be more systematic for the key stakeholders.

The current objectives set for the Operational and Performance Qualification team are generally following the criterion introduced in section 4.2 of this thesis. There are currently two objectives for the Operational and Performance qualification team. The first objective for the Operational and Performance Qualification team is to have enough orders to maintain a full workload for two specialists. The second objective is to have a set amount of turnover per specialist. Both objectives are result based, can be easily measured, and contain a single theme which is generating growth for the Operational and Performance Qualification team. The current resources to meet the above objectives are realistic as long as there is time reserved to sell the service for customers and OPQ service specialists are not used as a backup working force for the other services provided by the Advisory Services. The set objectives align with each other and there are no other objectives affecting the already set objectives.

To make objectives more specific and reachable it should be considered to use SMART requirements to define the objectives in the future. The SMART requirements are discussed in 4.2.3. Especially the time range of short term, intermediate term and long-term objectives should be added to the Sales Plan of the Operational and Performance Qualification team. The objective setting should be based on the principles of the qualitative and the quantitative objective setting. It is recommended to use both types of objectives as discussed in section 4.2.3. Once the required objectives are set to support the efficient marketing and sales of the service, the key stakeholders can move to next step which is the action planning.

5.3.3 Plan Action

Once the objectives for Operational and Performance Qualification team and service have been set based on the internal and external analyses. The key stakeholders must create a plan that ensures the needed actions are to be taken to meet the determined objectives in given time range. The one-year marketing plan discussed in section 4.3, can be applied for creating an action plan for the Operational and Performance Qualification team, as the purpose of the one-year marketing plan is to achieve the determined objectives in the given time range. The requirement is that the action plan will be documented, and the progress of the action plan must be evaluated occasionally during the action plan is being applied.

Improvement suggestions made by the Key Account Manager in workshop 8 regarding the Data collection 2 was that when the internal and external analyses are performed, the objectives are set and the action plan is prepared and documented, the key stakeholders should introduce the results of the analyses, the determined objectives, and the documented action plan on the business management level. This will help the business managers to understand the purpose and the intended goal and outcome of the Sales Plan. This helps the service and specialists providing the service is being acknowledged on the business management level. In addition, the business management can provide valuable feedback, development suggestions and even help to achieve the given objectives by sharing the information on business management level with other business units. This creates important transparency between the different organizations as one of the weaknesses identified in the Current State Analysis was the internal marketing for the Operational and Performance Qualification service is not properly executed.

Once the action plan for the Operational and Performance Qualification service is prepared and documented, the key stakeholders can perform the planned actions.

5.3.4 Perform

The perform step consists of elements introduced in the original Sales Plan documented in the Current State Analysis (figure 4 in section 3) and in the detailed Sales Plan Framework draft (figure 14). The elements presented in perform step of the detailed Sales Plan Framework draft are considered to be a part of performing the Operational and Performance Qualification service instead of steps of the Sales Plan and therefore the elements are moved to be a part of perform step. This was also confirmed with the Key stakeholders in workshop 7. Each element of the perform step is discussed in the overview of the Current State Analysis Stage in section 3.1.

In workshop 7, the Unit Manager emphasized the importance of mid-term sales meetings that discusses the closed sales, the ongoing sales, and the upcoming opportunities. According to the Unit Manager the mid-term sales meetings should be organized for example couple times per month. This way the key stakeholders are led to discuss the current state of the Action Plan, the Sales Plan and the need for mid-term evaluation or mid-term improvements. The need for mid-term improvements are considered as a part of continuous improvement of the services. The mid-term improvements should be based on mid-term evaluation performed in sales meetings. The mid-term evaluation is needed for example to evaluate that the progress of the objectives determined in the Action Plan are proceeding as planned or if further actions are needed to meet the objectives.

5.3.5 Evaluate

In the evaluating step of the Sales Plan Framework the determined objectives of the Action Plan are evaluated and measured. The key stakeholders must evaluate and measure if the determined objectives achieved and were the objectives achieved by the determined boundary conditions.

The performance of the sales and the service should be evaluated and measured by the evaluation and measurement principles presented in section 4.4. For the best results, the evaluation should be done based on the evaluation process presented in figure 11. The evaluation process presented in figure 11 provides a clear step-to-step process for evaluating the sales and the service. As discussed in section 4.4 the measuring should be based on the measurement standards as they provide fair assessment point in which the performance can be compared to.

The key stakeholders must also evaluate the competence of the service providers. The competence must meet the required level so that the service being provided is high quality and meets the required level of expertise. If some weaknesses are noticed during the evaluation process, the key stakeholders must organize needed training for the service providers.

5.3.6 Improve

The improvement is the last step of the evaluation and measurement principles presented in section 4.4. With the data collected from the evaluation and the measuring step of the sales plan, the key stakeholders are able to evaluate the need for the improvements in the sales plan and the Operational and Performance Qualification service. The improvement and development actions for the service and the sales must be based on the results of the evaluation and the measurement processes. The need for the improvements and development ideas are validated by the data collected from evaluation and measurement process so the need for improvement can be justified on the management level.

In workshop 8, the Key Account Manager emphasized that when developing and improving the Sales Plan and the service, the key stakeholders must be able to justify how and why the Sales Plan, or the service is going to be improved and what is the needed investment for the improvement. It was also discussed that, when improving the service, the key stakeholders must be able to reason and explain what is the additional value that the improvements will provide from customer point of view.

In the next section the validation stage of the proposed Sales Plan Framework is described.

6 Validation of the Proposal

In this section the results of the validation stage and further developments to the initial proposal are discussed. First the overview of the Validation Stage is discussed followed by introduction to the Data Collection 3 built in two different workshops. At the end of this section, the final proposal and further development propositions are presented.

6.1 Overview of the Validation Stage

The Validation Stage covers the feedback and further development ideas collected in two workshops for the initial proposal of The Sales Plan Framework presented in section 5. This section discusses the results of the workshops conducted to collect Data 3 for the feedback about the initial proposal. The goal of the Validation Stage is to gain a strong maturity for the final proposal and to reach an outcome that matches with the objective of the thesis and is generally agreed with the Key Stakeholders of the company.

The first step of validating the proposal for Sales Plan Framework was to prepare a new presentation for the key stakeholders. The base for the presentation was the same as used to present the initial proposal for the key stakeholders. The feedback and the development ideas from the initial proposal workshops were added to the new presentation.

The second step of validating proposal was to organize two workshops for the key stakeholders. The validation stage workshops focused on validating the comments, development ideas and feedback collected from the workshops conducted for the initial proposal of the Sales Plan Workshop. The data collected in the Validation Stage workshops are presented in table 4 as Data 3. The Key Stakeholders invited to the workshops were Senior Specialist responsible for Operational and Qualification team, The Unit Leader of Advisory Services, The Head of Managed Operations and The Key Account responsible for providing a valuable feedback, vision and perspective on sales and marketing of the services. The workshops had to be divided in to two different workshops due to scheduling problems in the organization.

The third step of the Validation Stage was to prepare a table for the data collection 3. The table shows key focus areas concerning the tools and methods presented in the initial proposal, Feedback from the Stakeholder, and the description for the feedback.

The last step of the Validation Stage was to prepare the Final Proposal for the Sales Plan Framework. The Final Proposal for the Sales Plan Framework has been built based on the feedback and comments collected from the Key Stakeholders in the Validation Stage workshops.

In the next section the findings of Data Collection 3 are presented.

6.2 Findings of Data Collection 3

In this section the data collected from Validation Stage workshops is presented. The data from the Validation Stage contains from Key Stakeholder feedback and it is used to build the final proposal for the Sales Plan Framework. It has also been presented in table if the Key Focus area of the initial proposal has been approved by the Key Stakeholders in the workshops. Below in table 4, Data Collection 3 is presented.

Table 4. Key Stakeholder feedback on the initial proposal

	Key focus area from the initial proposal	**Feedback from stakeholders**	**Description of the feedback**
Workshop with the key stakeholders			
1	Analyze	Approved	The Analyze step was approved with no further need for changes
2	Customer Analysis	Customer analysis must be specific	The Head of Managed Operations emphasized that the customer analysis must be specific and different types of customers must be analyzed when performing the customer analysis.
3	Set Objectives	Approved	The Objective Setting step was approved with no further need for changes
4	Plan Action	Approved	The Action Planning step was approved with no further need for changes
5	Perform	Approved	The Performing step was approved with no further need for changes
6	Evaluate	Approved	The Evaluate step was approved with no further need for changes
7	Improve	Approved	The Improve step was approved with no further need for changes
8	General	Introduction of the Sales Plan Framework	The Unit Leader and The Head of the Managed operations proposed that the Sales Plan Framework will be introduced and tested in the fall 2021.
Workshop with the Sales and Marketing professional			
9	Analyze	Approved	The Analyze step was approved with no further need for changes

10	Customer Analysis	Importance of the customer analyses	The key to win the customer loyalty is to go with the customer need as the main priority. Therefore, it is important to acknowledging the customer need and the customer analysis must be included in the Sales Plan Framework.
11	Customer Analysis	Importance of the customer analyses	It is important to create a trust relationship with the customer and to know how the relationship can be improved. This empathizes the need for the customer analysis.
12	Set Objectives	Approved	The Objective Setting step was approved with no further need for changes
13	Plan Action	Approved	The Action Planning step was approved with no further need for changes
14	Perform	Approved	The Performing step was approved with no further need for changes
15	Customer Analysis and Introduce	Importance of the customer analyses and Importance of the marketing	The introduction of the service to the customer must be done in a way that the service is presented as a solution for the problem the customer is experiencing. The Key Stakeholders performing the sales must understand the customer need and to be able to provide the service as a solution to the customer need. This emphasizes the need of the customer analysis and the importance of the marketing materials that answers to the customer need.
16	Evaluate	Approved	The Evaluate step was approved with no further need for changes
17	Improve	Approved	The Improve step was approved with no further need for changes

In the next section the final proposal for the Sales Plan Framework is discussed.

6.3 Final Proposal

In this section the final proposal for the Sales Plan Framework is presented. The final proposal of the Sales Plan Framework is built based on the feedback collected in Data 2 and Data 3. Data 3 is used to validate the initial proposal and the development ideas collected workshops 7 and 8. The development ideas for the initial proposal of the Sales Plan Framework is presented in figure 14 in Section 5. Each main step, tools, and methods of the final proposal of the Sales Plan Framework has been approved by the Key Stakeholders and the Business Management in the validation stage workshops 9 and 10. The approved main steps have been presented in table 4.

Below in figure 15 the final proposal of the detailed Sales Plan Framework is presented.

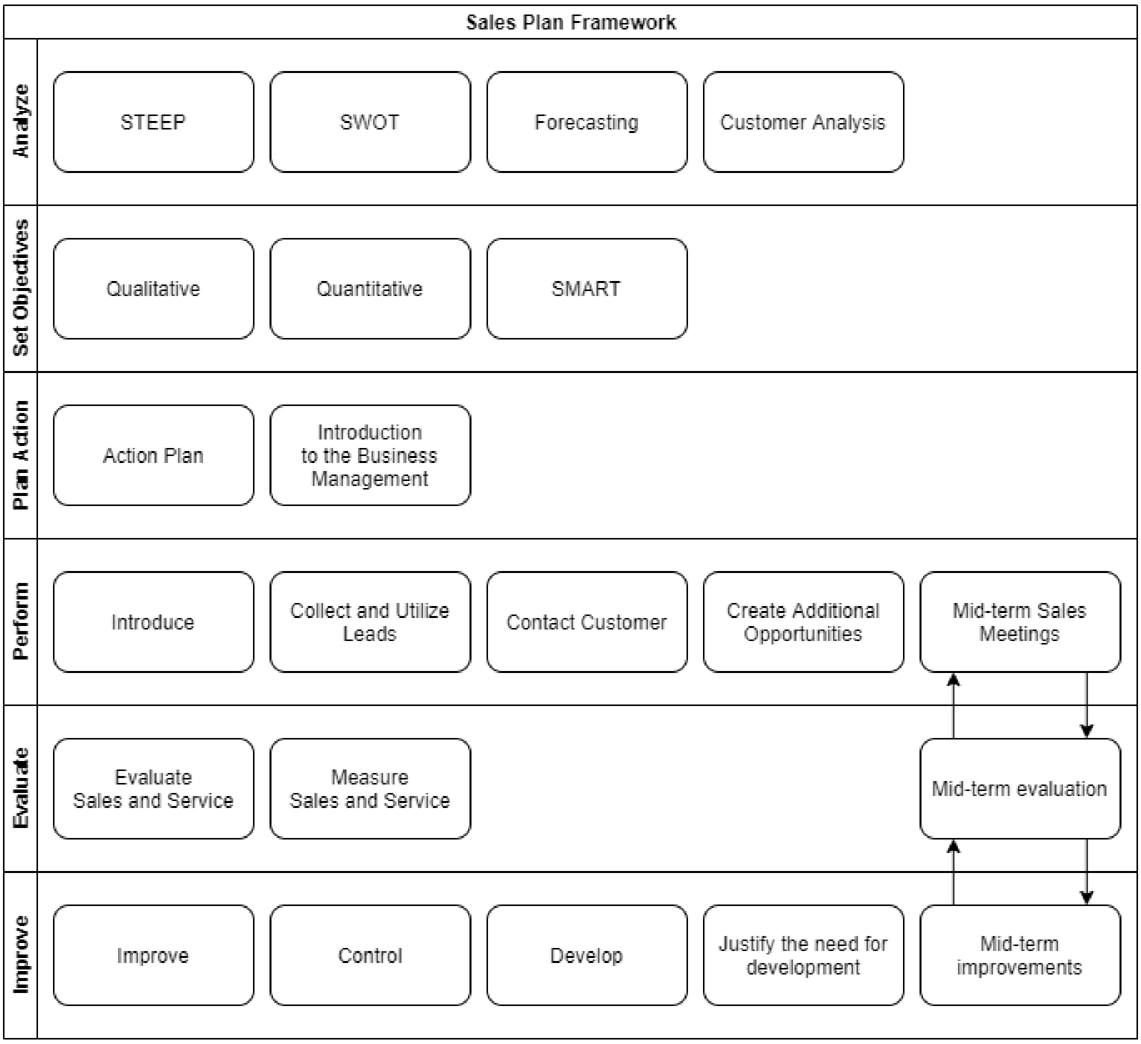

Figure 15. The final proposal of the detailed Sales Plan Framework

The analyse step, the tools and methods included in the analyse step of the Sales Plan Framework were approved by the Key Stakeholders and the Business Management. In the Workshop 9 and 10 the need for the Customer Analysis was emphasised by the Business Management. The Customer Analysis must be specific, and it must be conducted on different types of customers to understand the different types of customer need. The key to win the customer loyalty is to understand the customer need. By understanding the customer needs the Key Stakeholders are able to create a trust relationship with the customer which is conducive to create a long-term relationship with the customer. The Customer Analysis has been cooperatively approved to be a part of the analyse step of the Sales Plan Framework by the Key Stakeholders and the Business Management. No further changes for the analysing step are needed.

The objective setting step, the tools, and the methods to set the objectives were approved by the Key Stakeholders and the Business Management. No further changes for the objective setting step are needed.

The action planning step, the tools, and the methods to prepare and introduce the action plan were approved by the Key Stakeholders and the Business Management. No further changes for the action planning step are needed.

The perform step, the tools, and the methods needed to perform the according to the action plan were approved by the Key Stakeholders and the Business Management. In the validation stage workshop 10 the importance of introducing the service to the customer was discussed. The service must be introduced as a solution to the problem the customer is experiencing. Many customers may not understand the benefit of the service as the customer technical understanding may vary depending on type of the customer. This also emphasizes the need of a proper customer analysis because if the customer is well known the introduction of the service can be properly executed. No further changes for the perform step are needed.

The evaluation step, the tools, and the methods required to perform the evaluation process according to the Sales Plan Framework were approved by the Key Stakeholders and the Business Management. No further changes for the evaluation step are needed.

The improve step, the tools, and the methods required to improve, control, and develop the service and the service providers were approved by the Key Stakeholders and the Business Management. No further changes for the improve step are needed.

In the next section further recommendations for introducing the Sales Plan Framework and the Sales Plan are discussed.

6.4 Recommendations for introducing the Sales Plan Framework

The introduction of the Sales Plan Framework was discussed in the Validation Stage Workshop 9 and it was agreed that the best time to introduce the Sales Plan to the Operational and Performance Qualification team is the beginning of the fiscal year. The building of the Sales Plan must be started well in advance, but it is important to have some financial ratios available for the forecasting and objective setting. The introduction of the Sales Plan Framework for the Operational and Performance Qualification team is not discussed in this study as it is not included in the scope of this study.

The Sales Plan for Operational and Performance Qualification will be prepared on a Sales Plan template. The template for the Sales Plan will be prepared based on the main steps, tools and methods presented in the Sales Plan Framework. The template will be co-created with the Key Stakeholders and the Business Management to ensure that the Sales Plan will meet the required scope and depth. The preparation of the Sales Plan or the Sales Plan template for the for the Operational and Performance Qualification team is not discussed in this study as it is not included in the scope of this study.

6.5 Other development ideas revelated in the interviews and workshops

According to interviewee 1, the internal awareness of the services could be raised by providing clear marketing material for other organizations such as the sales organization. The sales of the service could also benefit from better internal communication. By providing other organizations with clear marketing material and the positive customer experiences, the other organizations will eventually become familiar with the service. The customer also stated in interview 3 that the marketing material could be updated to be more customer specific as some customers may not understand the technical aspect of the Operational and Performance Qualification Service.

According to interviewee 2, to gain more sales, the Operational and Performance Qualification service could be introduced for all regional sales teams. Currently the service is being recognized only in the Southern Finland. The recognized problem of providing the service in all regions of Finland is that the distances between the service provider location and the customer could be very long and lead to expensive additional costs such as milage and overnight allowances. With proper planning and negotiation between the service providers and the customer, the service can be executed also in other regions of Finland. For instance, if the customer owns multiple buildings the additional costs can be divided to several buildings. The development idea received in interview 2 is topical and something Key Stakeholders must find a way to perform in the future.

In the next section the conclusion of the thesis is discussed.

7 Conclusions

This section discussed the conclusion of the thesis. The executive summary briefly discusses the objective and progression of the study, the results of the current state analysis, the conceptual framework, the outcome of the study, and the business impact. The managerial implications discuss the recommendations toward the implementation of the Sales Plan Framework followed by the evaluation of the thesis. This section ends the thesis report with Closing Words.

7.1 Executive Summary

The object of this thesis was to create a measurable Sales Plan Framework for the Operational and Performance Qualification Service. The Operational and Performance Qualification Service is part of the service portfolio provide by the Advisory Services in Caverion Finland Oy. The topic of the thesis was important as the Advisory Services is a growing organization and there are no documented or measurable sales plans were used to control and develop the sales of the services provided by the Advisory Services. This had led to low hit rate on quotations, complex service descriptions, and to lack of understanding the market potential and need for the Operational and Performance Qualification Service.

The study was conducted in four steps. First, the Current State of the Sales Plan and Sales Process of the Operational and Performance Qualification Service was analyzed by interviewing the Key Stakeholders, the Sales, and the Business Management. Second, the best practices, tools, and methods from the relevant literature was researched to form a strong Conceptual Framework for the thesis. Third, a co-created initial proposal was designed and feedback for the initial proposal of the Sales Plan Framework was collected. The last step of the thesis was to validate the final proposal with the organizational management and the Key Stakeholders.

The Current State Analysis revealed that although there are lots of potential leads and huge customer base to be utilized, the Operational and Performance Qualification Service performs poorly as Sales Plans are non-existing or not well implemented in organizations which leads to unknown market potential and customer need, poorly maintained marketing materials and to lack of data to justify the need of developing the service.

The literature research focused on finding best practices, tools and methods from literature focusing on Sales and Marketing Management, Business Strategy and Sales and

Marketing Planning. The Conceptual Framework for the thesis was formed based on these topics.

The outcome of this thesis is a measurable Sales Plan Framework that can be utilized to create a comprehensive and measurable Sales Plan for the Operational and Performance Qualification Service. The tools and methods introduced in the Sales Plan Framework helps the Key Stakeholders to analyze the market, set the objectives, plan the provision of the service, measure the results, and improve the service and the Sales Plan based on the results. By utilizing the methods and tools presented in the Sales Plan Framework, the Key Stakeholders are able to follow a documented and well-prepared Sales Plan throughout the sales plan cycle and justify the improvement and development needs based on the data collected during the sales plan cycle.

The proposal for the outcome of this thesis has been validated with the Key Stakeholders and on the management level of the target organization. The first part of the validation process was to collect feedback and development ideas on the initial proposal for the Sales Plan Framework. The second part of the validation process was to collect feedback on the final proposal for the Sales Plan Framework. The feedback and development ideas were collected in workshops and interviews from the Key Stakeholders and management of the target organization.

The business impact of the Sales Plan Framework is yet to be known as Sales Plans are currently not used in the target organization, but if the Sales Plan Framework will be implemented for the Operational and Performance Qualification Service, it will provide the Key Stakeholders a clear and documented method to develop a measurable Sales Plan. With a measurable and documented Sales Plan the Key Stakeholders are able to identify and outcome the challenges that affect the poor performance of the service and negative customer experiences, such as complex service descriptions.

7.2 Managerial Implications

In this section the Managerial Implications for implementing the proposed Sales Plan Framework into practice is proposed.

The first step towards the implementation of the Sales Plan Framework in use of the Operational and Performance Qualification team is to prepare a comprehensive template for the Sales Plan that covers tools and methods included in the Sales Plan Framework. The template for the Sales Plan helps to form a picture of how extensive the Sales Plan is going to be and how much time should be reserved to prepare the Sales Plan. The second advantage of using a template is that by doing this the preparing of the Sales Plan can be controlled and Sales Plans will be as profound as required.

The second step towards the implementation is to validate the Sales Plan template on the business management level and make the needed modifications. The validation process may consist of workshop held together with the Key Stakeholders and business management. In this workshop the scope of the Sales Plan can be discussed if the Sales Plan template is too extensive or concise. The validation step is important as it should define the scope of the analyses, the objective setting, and the action planning of the Sales Plan. Once the Sales Plan template is validated by the business management, the Key Stakeholders can proceed to build the first Sales Plan.

The third step towards the implementation of the Sales Plan Framework is to introduce the Sales Plan to the use of the Key Stakeholders performing the service. The Sales Plan should be tested at least for one sales cycle. Based on the data collected from the first sales cycle the management can choose to continue to use the Sales Plan Framework, make some alterations based on the need or even implement the Sales Plan Framework in the use of other services and organizations. As the Sales Plan Framework is universal and not tied to any specific service, it can be used by various organizations.

The management should consider reserving a generous amount of time for the preparations as well-prepared and documented Sales Plan will help the service providers to form a clear understanding of the service, the market and the customers which will most probably lead to better results. With the Sales Plan the service providers are also able to plan their actions to meet the given objectives and the development needs can be justified by using the data collected within the sales plan cycle.

7.3 Thesis Evaluation

In this section the outcome of the thesis is evaluated based on the initial objective.

One aim of the study was to analyze the Current State of Sales Plan and the Sales Process and after that, identify the best practices from the relevant literature. The reliability and validity requirements will be met if the Key Stakeholders and the Business Management co-operatively approve the proposed Sales Plan Framework.

The initial objective of this thesis was to prepare a measurable Sales Plan Framework that can be used to form a measurable Sales Plan for the Operational and Performance Qualification service. The initial objective was achieved as the outcome of the thesis is a Sales Plan Framework that include measurability as part of the Sale Plan.

In order for the thesis to be more comprehensive, the literature research could have been more extensive and other types of tools and methods could have been discussed in the literature research. The researcher could have discussed which type of analyses would have been beneficial regarding the Sales Plan Framework and which type of analyses would not be beneficial to use. The research could have also discussed more about different ways of measuring the results whereas now the thesis only explains the basics of measurability and leaves out discussing the different types of measuring methods. The reason why different types of measuring methods have been left out of the discussion is that there are unlimited ways to measure the business and the listing of different types of measuring methods was chosen to be left out of the scope of this thesis. Although many different types of analyzing and measuring methods have not been discussed in the thesis, the Conceptual Framework is comprehensive enough to prepare a Sales Plan Framework that covers analyses and measurability as required.

The Current State Analysis was executed by conducting six separate interviews for the Key Stakeholders, the management and for other relevant individuals. The Current State Analysis could have been more thorough if also the personnel responsible for marketing in the company would have been interviewed. This could have benefited the Current State Analysis with a view and ideas from marketing point-of-view. The potential views and ideas could have been utilized in the Sales Plan Framework.

To ensure the validity of the study all interviews and workshops were recoded as field notes which are shared with each interviewee attending the specific interview. This provided clarity and the misunderstandings can still be fixed afterwards. Almost all meetings were held as online meetings due to ongoing Covid-19 outbreak was still affecting the regular working practices in most workplaces. Interviews were conducted as a semi-structured interview, and researcher asked only nonbiased clarifying questions to ensure the validity of the answers. By doing this, the researcher bias would not have effect on the opinions and answers of the interviewees.

To ensure the reliability of the study, the data for this study were collected from various sources. Interviews and workshops were held for many different interviewees working in different parts of the organization and in different organizations to gain a comprehensive description for each section of the process. In order to gain even more comprehensive results, the marketing organization of the case company could have been involved in the interviews and workshops.

7.4 Closing Words

The thesis project produced a universal Sales Plan Framework to the case company that can be utilized in the target organization but also in other organizations as well. The thesis project was a success as it has taught the researcher and the target organization about the importance of the Sales Plans. This project could not have been executed properly without inter-organizational cooperation and help of the colleagues.

References

Caverion. (2020). Caverion website. Caverion lyhyesti. Available at: https://www.caverion.fi/tietoa-caverionista/caverion-lyhyesti [Accessed 15 December 2020]

Kothari, C.R, (2004). Research Methodology – methods & techniques. New Age Limited Publishers. Available at: https://ebookcentral.proquest.com/lib/metropolia-ebooks/search.action?query=kothari [Accessed 10 January 2021].

Flick, Uwe, (2006). An introduction to qualitative research. 3rd ed. London: SAGE Publications Ltd.

McNiff, Jean, (2013). Action Research: Principles and Practice. Taylor & Francis Group. Available at: https://ebookcentral.proquest.com/lib/metropolia-ebooks/search.action?query=McNiff [Accessed 10 January 2021].

Jobber, D. et al. (2019). Selling and Sales Management. 11th ed. Harlow, England. Pearson.

Bensoussan, B. and Fleisher, C. (2013). Analysis without paralysis : 12 tools to make better strategic decisions. 2nd ed. Upper Saddle River, New Jersey: FT Press cop. Available from https://learning.oreilly.com/library/view/analysis-without-paralysis/9780133086331/?ar [Accessed 22 February 2021].

Friend, G. and Zehle, S. (2004). Guide to business planning. 1st ed. Hatton Garden, London. Profile Books Ltd.

Cuevas, J. et al. (2016). Sales Management Strategy, Process and Practice. 4th ed. London, England. Palgrave.

McDonald, M. and Wilson H. (2011). Marketing Plans: How to prepare them, How to use them. 7th ed. West Sussex, United Kingdom. John Wiley & Sons Ltd.

Seidman D. (2012). The Ultimate Guide to Sales Training: Potent Tactics to Accelerate Sales Performance. 1st ed. San Francisco CA. Jossey-Bass. Available from

https://ebookcentral.proquest.com/lib/metropolia-ebooks/reader.action?docID=817387
[Accessed 3 March 2021].

Interview questions

Sales related questions

1) Are you aware of what the operational and performance qualification service contains?
   a) If yes, can you briefly explain the contents?
   b) If no, how could the knowledge about the service be increased?
2) Do you have enough information about the service to sell it actively?
   a) Do you know where to look for additional information about the service and what kind of additional information would benefit the sales and how should this information be shared?
3) What are the benefits of selling the OPQ service?
4) What are the challenges when selling the service?
5) Who are the potential customers for this specific service?

Management related questions

1) Does Caverion Finland actively use sales plans?
   a) Where can the sales strategy and plans be found?
   b) How are the sales strategy and plans implemented in the company?
   c) Who should acknowledge the sales strategy and plan?
2) What are the key measurements to measure sales and services?
3) What is the current turnover target for Operational and Performance Qualification team?
4) What is the turnover target in next year?
5) What is the growth target for Operational and Performance Qualification team?
6) Is there any kind of growth plan for Operational and Performance Qualification team?

Service-related questions

1) What are the key targets of the OPQ service?
2) Are there any secondary targets for the OPQ service?
3) What are the challenges when executing the OPQ service?
4) What are the benefits when executing the OPQ service?
5) How should the OPQ service be improved in future?

Customer related questions

1) What are the most common problems in buildings?
2) Do the contents of the OPQ service report answer your expectations?
3) Is there something you expected more of the report?
4) Is there any unnecessary information on the report?
5) Do you feel like the service meets the demand?
6) Did the communication work well with Caverion?