



# **How CRM tools support the sales representatives within the mobile operator sector in Finland**

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<p>Abstract:</p> <p>Customer relationship management (CRM) is crucial for any company in today's world to stay competitive. Different tools provide different benefits. CRM tools are used in various fields, departments, and for various purposes. This study investigates how CRM tools benefit the sales representatives within the mobile operator sector in Finland. The problem investigated in this study was if the CRM tools used by B2C sales representatives in the telephone operator sector in Finland are sufficient in practice and how they theoretically can be improved. This research was conducted using a qualitative research method in the form of a semi-structured interviewing. The results were analysed using a thematic analysis. It was found that the major benefits that the tools offer to the sales representative in the mobile operator sector in Finland was the customer events (history) log, specific AI product offering and overall efficiency in the form of saved time, for example. In the study it was found that the benefits that CRM tools bring to the sale process varies somehow between the B2B and the B2C sector. The benefits that the CRM tools bring to the sales process within the B2B sector was mainly the enabling of all customer data to be collected in one database or tool which enables an easier way to control the sales funnel. It also helps in finding the most important sales opportunities and keeps the sales representatives focus on the right things at the right times. It was also found that they provide a higher insight of small details which the human eye would not necessarily notice otherwise. On the other hand, the benefits that the CRM tools bring to the B2C sales process were the quick, tailored, and precise decision making regarding the product offering, which aims to satisfy the customers need. It was also found that CRM tools help in the creation and mapping of the overall picture of the customers interaction with the company. This helps speeding up the sales process, saves time, makes the interaction with the customer more natural and prepared valid data to counter objections.</p>	
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# CONTENTS

<b>1</b>	<b>Introduction.....</b>	<b>5</b>
1.1	Problem statement .....	5
1.2	Aim & research questions .....	6
1.3	Methodology used .....	6
1.4	Thesis structure .....	7
<b>2</b>	<b>Theory .....</b>	<b>7</b>
2.1	Sales.....	7
2.1.1	<i>Up- and cross-selling.....</i>	7
2.1.2	<i>B2B vs B2C .....</i>	9
2.1.3	<i>B2C buying process .....</i>	9
2.1.4	<i>B2B buying process.....</i>	11
2.2	CRM .....	12
2.2.1	<i>History of CRM .....</i>	12
2.2.2	<i>CRM in general.....</i>	12
2.2.3	<i>CRM in B2B.....</i>	13
2.2.4	<i>CRM in B2C.....</i>	14
2.2.5	<i>Sales funnel.....</i>	15
2.2.6	<i>Customer experience .....</i>	18
2.2.7	<i>CRM benefits.....</i>	19
2.2.8	<i>The use of CRM within operator sales in Finland .....</i>	20
<b>3</b>	<b>Methodology .....</b>	<b>21</b>
3.1	Approach .....	21
3.2	Data collection .....	22
3.3	Sample selection .....	23
3.4	Interview guide .....	24
3.5	Data analysis .....	25
3.6	Validity & Limitations .....	26
<b>4</b>	<b>Results .....</b>	<b>27</b>
4.1	The importance of CRM .....	27
4.2	CRM benefits on sales .....	28
4.3	CRM improvements.....	30
4.4	Disadvantages of CRM .....	31
4.5	Future of CRM.....	31
<b>5</b>	<b>Discussion &amp; Conclusion.....</b>	<b>31</b>

5.1	Discussion regarding the resulted themes .....	32
5.1.1	<i>The need for data</i> .....	32
5.1.2	<i>How CRM tools help the sales process</i> .....	33
5.1.3	<i>CRM development</i> .....	36
5.1.4	<i>Negative sides of CRM</i> .....	37
5.1.5	<i>Expectations of CRM</i> .....	37
5.2	Summarizing the results with the research questions.....	38
5.2.1	<i>Research question 1: Which CRM features benefit the sales process the most and what can be improved?</i> .....	38
5.2.2	<i>Research question 2: How will the future of CRM look like?</i> .....	39
5.3	Choice of method .....	40
5.4	Ideas for further research .....	40
5.5	Conclusion .....	41
	<b>References .....</b>	<b>43</b>
	<b>Appendix .....</b>	<b>46</b>

## Figures

Figure 1.	The consumer decision-making process: how they buy. (Jobber et al., 2019)...	9
Figure 2.	Sales funnel. (Halligan & Shah, 2014, Chapter 24, Section 1, para. 4).....	16
Figure 3.	Prospects to customers. (Halligan & Shah, 2014, Chapter 13, Section 1, para. 4).....	17
Figure 4.	Conversion rate: prospects to leads. (Halligan & Shah, 2014, Chapter 11, Section, para 8.).....	18
Figure 5.	Gartner's CX Pyramid. (Tincher, 2018) .....	18
Figure 6.	The main steps of a qualitative research. (Bryman & Bell, 2011, p.390).....	22

## Tables

Table 1.	Sample selection.....	23
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# **1 INTRODUCTION**

When I started working at Elisa Oyj in the beginning of 2017, I was introduced to various CRM (Customer relationship management) tools that I was taught to use daily. With some help from my colleagues, it took me only about a week to fully familiarize myself with these tools. I quickly discovered the benefits these tools could offer to the sales process in every single customer encounter when utilized correctly.

I was always fascinated by how effective they were and how easy they made the customer encounter and the product offering. You could see what products the customer had and have had. You could see the current offer and the normal price of the product. When a new CRM tool was introduced to us, I quickly transitioned and adapted my doings to it. In my new position at the new team at the company, I was asked to introduce the tool to both old and new sales representatives. I was often appointed as an expert user within my working community. With the experience of utilizing these different tools for many years, I started thinking about the future of CRM and sales.

What will these tools look like and what can they do? Can they become more efficient and how would that benefit the sales process? All these experiences and thoughts gathered are the reason why I chose to do my thesis research on CRM tools and their benefits on sales specified on the telephone operator sector in Finland.

## **1.1 Problem statement**

The problem statement that will be investigated is if the CRM tools used by B2C sales representatives in the telephone operator sector in Finland are sufficient in practice and how they theoretically can be improved to benefit the sales representative even further. The data needed to answer the question will be gathered using interview guides. One for the B2C sales representatives in the telephone operator sector in Finland and one for the CRM professionals in the B2B sector in Finland.

The researcher will compare the sales representatives' answers in the B2C sector with the data gathered from the CRM professionals in the B2B sector.

## 1.2 Aim & research questions

**The aim** of this study is to investigate the benefits that CRM tools provide to the sales processes both in the B2B and the B2C teleoperator industry. There are three major companies that basically control the telephone operator sector in Finland. These are Elisa, Telia and DNA (Traficom, 2020). This study is going to scrutinize the benefits that these different tools bring to the table and investigate why they are such vital tools for the sales representatives. This study attempts to gather information about CRM by comparing data gathered from sales representatives who work in different companies in the telephone operator sector in Finland (B2C), with data from CRM experts and sales representatives that work within the B2B sector.

This research additionally aims to answer the following questions:

**RQ1:** Which CRM features benefit the sales process the most and what can be improved?

**RQ2:** How will the future of CRM look like?

No matter how profound this study is going to be, there is much room for research within this topic. Limitations regarding the study are that the focus is going to be targeted in one country: Finland. What can be expected in this thesis is a clearer image of the CRM tools preferred and mostly used at the customer interface level amongst the sales representatives. Many different tools are being utilized daily by the sales representatives, and the goal is to find out which features are used the most and provides the greatest benefit.

## 1.3 Methodology used

A qualitative research method in the form of semi-structured interviews is going to be utilized to get a clearer picture of the study. The interviews will be conducted to seek an understanding of the use of CRM tools, its benefit on sales and its relevance in the customer interface. According to Bryman & Bell (2011), there are four traditions of qualitative research. These are: naturalism, ethnomethodology, emotionalism, and postmodernism. The approach in which this research was conducted identifies itself with the naturalistic tradition. The naturalistic tradition “seeks to understand social reality in its own

terms; ‘as it really is’; provides rich descriptions of people and interactions in natural settings” (Bryman & Bell, 2011, p.387).

## **1.4 Thesis structure**

The thesis consists of five main chapters, which mainly follow the IMRD structure, i.e., introduction, methods, results, and discussion. (Hirsjärvi et al. 2015). The thesis starts with the introduction to the research, where the reader will touch upon the surface of the topics and the factors that are reviewed along the study. The theory chapter is divided into two categories, the sales category, and the CRM category. The theory part is followed up by the methodology section where the researcher comprises the methods used for preparing, gathering, and analysing the data for the study. After this part there comes the displaying of the results which is followed up by a discussion and conclusion part.

## **2 THEORY**

This chapter is divided into two categories: sales theory and CRM theory.

### **2.1 Sales**

A sale is when a product or a service is exchanged for value, usually this value being money. According to (Schwartz, 2006) there are various personal traits that a salesperson usually possesses. Some of them are communication and interpersonal skills, product knowledge and driven fast thinking.

#### **2.1.1 Up- and cross-selling**

The resources used to manage customer relationships include data, IT infrastructure, software applications, devices, workflow, and people (Buttle & Maklan, 2019). For example, with (in the best case) social signum of the customer or another customer-specific number, a CRM tool or system can allow the sales representative to see all data and products that the customer withholds or has previously owned. These tools also make progressive suggestions for up-and cross-sales possibilities aiming to facilitate the sales

representative's product offerings. They not only suggest solutions but keep track of the customers buying behaviour. Regardless of how developed these tools are, the most crucial resource enabling the CRM tools to work is the data provided into the system by people. (Buttle & Maklan, 2019)

Up-sales means updating a product or a service by improving the product or service. Upselling can be defined as the attempt to persuade customers to purchase a product or service at a higher level (Guillet, 2020). This way of selling aims to result in a product or a service that is likewise richer in its characteristics for the customer and is more fruitful for the company rather than the originally reserved product. An upsell also consequently broadens a customer's lifetime value curve in the eyes of the company. An example of an up-sell would be offering an update to the customers current mobile phone subscription where the current 4G subscription would be updated to a 5G subscription. This could be seen as common, for example, in the case where the customer has bought a new device that supports the faster network (Guillet, 2020).

Cross-sales, on the other hand indicates selling a new product to provide additional benefit to the customer. Additional products or services that can be attached to main products are sold using the cross-sales method. Warren (2017) defines cross-selling as a more complicated method than just doing additional sales to existing customers to generate extra profit. Warren (2017) writes that effective cross-selling involves drawing your clients' attention to additional needs, and allowing you to sense, serve, and satisfy the needs of your existing clients and maximize the full potential of your client base (Warren, 2017).

The best professionals know that cross-selling improves customer loyalty, increases profits, and strengthens relationships. The key to cross-selling success is understanding and believing in your products. You should always work in the best interests of your customers and clearly define your skills through constant learning. (Warren, 2017) An example of a cross-selling product within the telephone operator sector is an antivirus software product which aims to protect your device from malware.

### 2.1.2 B2B vs B2C

In their eBook about selling and sales management, Jobber et al. (2019) argues that there are differences that can be found regarding sales between the B2B and the B2C environments. Other varying factors between these two are the buying and selling processes that vary from country and culture all around the world. According to Jobber et al. (2019), typical organizational (B2B) buying traits are: fewer buyers, larger customers, closer long-term relationships (e.g., key account selling), more rational buying, higher specific requirements, reciprocal, riskier on average as well as more complex than consumer buying.

On the other hand, the consumer buying behaviour is vastly different. A reason for this is that people buy products and services for personal consumption, whereas businesses purchase most are aimed at the general benefit of the whole company (Jobber et al., 2019). However, products can sometimes be difficult to separate in two one or the other category, e.g., cars, since their buying purpose can be seen as suitable for both.

### 2.1.3 B2C buying process

The decision-making process can be seen as a problem-solving or need-satisfaction practice according to behavioural scientists, for example, the reason for buying a calculator might be to solve an existing problem (Jobber et al., 2019).

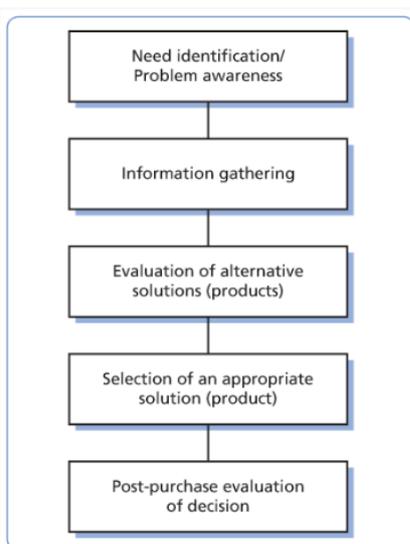


Figure 1. The consumer decision-making process: how they buy. (Jobber et al., 2019)

The need identification/problem awareness stage is usually practical. When taking the calculator as an example, as a sales representative, you would want to sell the features that represents the solution for the problem. For example, by showing and explaining the calculator's speed and accuracy (Jobber et al., 2019). The need in another product can be symbolized as an emotional or psychological factor. For example, an expensive t-shirt with a designer branding might be bought for its status rather than its function as a product. Jobber et al. (2019) explains that a need can emerge for various reasons. For example, when a person grows older and has therefore grown out of a pair of jeans. This need then appears as a natural process of life.

The information-gathering stage might vary from consumer to consumer. Some like to gather as much information about a product or a service as they can before making the buying decision. On the other hand, other peoples' buying behaviour might resemble a more impulsive style (Jobber et al., 2019). For example, when buying a car, a soon-to-be car owner might only be satisfied with its purchase after a careful search through of information followed up by a visit at the local car dealership to look at the car in person. Some might additionally ask for a friend's advice and even look at videos about the car online. Surely, the scope of the information gathering stage vary from buyer and product, but today's consumers are, thanks to the internet, more informed as buyers, than ever before. As an example, approximately 75 per cent of people buying a new mobile phone in the United States has researched about the phone online prior to the purchase (Jobber et al., 2019).

According to Jobber et al., (2019), there are four steps in the evaluation and selection of suitable solution. These are in an example of a car purchasing process:

- 1) **Evaluation** (choice) criteria: comparison and evaluation of product or brand. E.g., fuel economy, purchase price and reliability.
- 2) **Beliefs**: the degree to which a product has different characteristics. E.g., roominess of a car.
- 3) **Attitudes**: liking or disliking a product, reliant on the evaluation and beliefs criteria. E.g., A consumer's choice and beliefs indicate that a cars fuel economy is poor at 15 km/l at 90 km/h because they do not like the car, when others that like the car might think that the fuel economy is good or decent.

- 4) **Intentions:** the likelihood that attitudes will be acted upon. Favourable attitudes > increased buying intention which raises the odds of purchasing.

From a company's viewpoint, the post-purchase phase is important since they usually aim to create satisfied customers that will purchase their product or service again in the future. However, many consumers experience a sort of post-purchase angst right after the purchase. E.g., the car buyer that reads car magazines after having bought a new car most recently (Jobber et al., 2019). This is usually a reaction in a consumer's mind after doubting their purchase decision. In this stage, the sales representative usually reassures the buyer of a correct choice (satisfied need) to create customer goodwill and ensuring a high satisfaction regarding the company and its product (Jobber et al., 2019).

#### **2.1.4 B2B buying process**

According to Kotler & Armstrong (2017), organizations buying activity can be divided into two parts: The buying centre and the buying decision process. The buying centre, which also acts as the decision-making unit of the organization, includes many departments, levels, and people in different stages with different roles at each stage. The buying centre of a company can be defined as “all the individuals and units that play a role in the purchase decision-making unit.”, (Kotler & Armstrong, 2017, p. 192).

According to (Kotler & Armstrong, 2017), these members can play any of the five roles:

**Users:** Members of the organization who uses the product or service. Users often start the buying motion and aid the description of the products specifications.

**Influencers:** Advice the users with the product specification as well as specifies information for evaluating options. Important influencers are typically the technical personnel of a company.

**Buyers:** Possesses the power to choose the supplier and form terms of acquisition. Their major role is to select the merchants and bargain with them.

**Deciders:** Have formal or informal power to pick or accept the final suppliers. In more routine buying behaviour processes, the buyers usually make the decision or at least approves the purchase.

**Gatekeepers:** Manage the information flow to the others in the buying center. For example, buying agents usually bear control of hindering salespersons from seeing users or deciders.

## **2.2 CRM**

According to Buttle & Maklan (2019), CRM is a process where a firm mainly focuses on their customers through active management of processes and resources, which enables the relationship to survive and prosper while benefiting both parties.

### **2.2.1 History of CRM**

According to (Jackson, 2005), decision support systems (DSS) have been around for over 50 years. During the period of 1970-1990, these systems became increasingly popular in connection with technical breakthroughs and a better economy. One of the biggest breakthroughs from this time was the establishment of the microcomputer software company which is more commonly known as Microsoft.

The company was founded in 1975 and in the course of time grew to become a major multinational technology corporation (History.com, 2015). Customer relationship management and decision support systems were developed to enhance the decision-making processes in all stages of customer relationships. These stages being acquisition, development, and retention, (Jackson, 2005). Despite the early establishment in the 1970s, CRM tools came to its name and accumulated popularity in the 1990s. Another important feature of these tools is to create long-term value between the company and the customer, (Jackson, 2005). Although DSS has been around a longer time than CRM, CRM has proven its functionality and importance when it comes to sales. Many sales-focused organizations have developed CRM systems in the form of technologies, mainly focusing on sales force automation and call centre support. (Jackson, 2005)

### **2.2.2 CRM in general**

A CRM system can be seen as a collection of processes that gathers data, by which corporations learn from their customers by collecting, storing, using, and transferring

customer information throughout the organization (Zahay & Griffin, 2003). Boulding et al. (2005) outline CRM as a strategic tool for managing created value, intelligent use of knowledge and technology, acquiring customer data, and distributing information to stakeholders that are seen as relevant to the organization. The system manages semipermanent relationships with specific customers and customer groups and allows various processes to communicate in the different areas of the company (Boulding et al. 2005).

CRM is crucial in all types of businesses to keep track of your clients. Typically, these kinds of relationships and tools are mostly common in areas of business such as marketing and sales, for example, where the customer acquisition and retention play a huge part. (Buttle & Maklan, 2019). Sales organizations worldwide spend millions of dollars every year to improve their sales technology, which aims to improve the company's productivity, communication, and customer relationship (Rodriguez et al., 2018).

The demand for CRM technology has risen quickly which also indicates its significance in the modern business world. Businesses that operate worldwide have directed their key prominence on establishing buyer-seller alliances (Rodriguez et al., 2018). Although researchers question the long-term significance of sales technology, the study about the influence CRM has from a global viewpoint is restricted. Rodriguez et al. (2018) argue that sales organizations must consider not just how CRM can help an enterprise, but also how CRM can meet the needs of a particular region's sales process in today's global climate.

### **2.2.3 CRM in B2B**

Businesses want client data gathered from a range of information sources and customer interfaces. For information from various sources to be obtainable to all members, the data is obligated to be collected and stored in an easily accessible format (Peltier et al., 2013). This problem has successfully been solved with numerous customer relationship management (CRM) tools. Systems are characterized as technology-based solutions that enable the development and maintenance of relationships using data. Data can be collected and shared with relevant stakeholders, so that information can be disseminated, and relationships strengthened (Peltier et al., 2013).

Underdahl (2017) writes in her article about nurturing that building real and mutually beneficial business relationships requires consistent and dedicated work overtime. This means that in any case of business, small or large, you want to store your customers information in a tool that is easy and effective to use, which for example, can help you recognize the previous purchasing history between your company and the customer.

In their article about the differences between CRM in B2B vs B2C environment, Kolis & Jirinova (2013) states that the volumes of the transactions being vastly larger in a B2B environment compared to the B2C environment. The reason being less subjects in a B2B environment which leads to a higher value and amount in purchase in each transaction (Kolis & Jirinova, 2013). Kolis & Jirinova (2013) write that the most varying characteristics between CRM in B2B and B2C is the greater degree of independence between buyers and sellers which can be interpreted as the B2C environment showing more personal traits and feelings involved such as different view on value for example.

#### **2.2.4 CRM in B2C**

Payne and Frow (2005) writes about customer relationship management as a strategic process for increased value for the organizations by developing relationships with clients and numerous customer segments. They describe the method of cross-border integration of people, functions, and marketing capabilities deployed through data, technology, and applications. CRM systems thus provide better opportunities to use and develop customer information to better perceive customers and to form customer value along with them. (Payne & Frow 2005)

In their article about the differences between CRM in B2C and B2B, Kolis & Jirinova (2013) describes four primary components of service CRM: satisfaction, customer loyalty programs, customer retention programs, and customer lifetime profitability. Speed and knowledge as well as good service is the most important factor when looking at customer service. Competition between companies is fierce, and when a company cannot just give its customers what they want, they immediately put themselves at risk of losing the customer to another competitor (Oksanen, 2010).

With CRM, a company can serve its customers' needs better and keep their customers happy because with the help of CRM, a company has already familiarized themselves with their customers to some extent (Oksanen, 2010). To be successful in a CRM project, resources, work, and stakeholder commitment need to always support each other. A large part of CRM projects fails due to a lack of commitment by management and staff. In CRM projects, the typical goal is to make 'difficult' data into visible customer information that can be of use (Oksanen, 2010). This also enables other employees of the company to be aware of the customer's history, their agreements, and plans. Oksanen (2010) writes that the customer's point of view can easily be stupefied if you must give historical information about these earlier mentioned matters each time you are in contact with the organization in question.

When the information is available to everyone necessary, customers can be served more efficiently and individually. Using a CRM program also ensures that customer contacts remain within the organization even after the customer encounter is finished (Oksanen, 2010).

### **2.2.5 Sales funnel**

According to Halligan & Shah (2014), the first step when constructing your company's sales funnel is to make a list of sources/campaigns/inputs that are to be placed on the top of the funnel (or pipeline), which aids the company in prospect creating for the products and services that a firm offers.

The next step is called the 'leads stage' which imply any prospect that a sales representative has designated as a likely buyer with whom they are able to spend at least an hour with, showcasing and reviewing the product or service that the company offers. (Halligan & Shah, 2014). When the sales representative has offered a product suggested by a CRM tool, the information gets stored in the system. The customer might be strongly against buying the product, thinking about buying or being ready to buy in the nearest future.

From a sales perspective, nurturing hot and cold leads is one of the key beneficial factors that CRM tools have to offer. (Buttle & Maklan, 2019). Founder and CEO of LeadX Tom

Aas (2020) writes in his article about lead management that leads are businesses or people who can eventually turn into clients for your organization. Leads are people or companies who may have interest in your services or products, although you do not have full context as to the reason for their interest or when they are likely to make a purchase decision. (Aas, 2020)

Halligan & Shah (2014) calls the next stage the opportunity stage, which indicates that the promising customer is an active believer in the product or service and its potential it offers to bring to the buying company. This potential customer is favouring the idea of a purchase in the nearest future (current quarter).

The last level of the funnel is determined as the ‘customer’ step or, in other words, someone who already has made the purchase decision on the product or service that the company offers. They emphasize that the most fundamental thing about a sales funnel is that you have one that is routinely measured. (Halligan & Shah, 2014)



Figure 2. Sales funnel. (Halligan & Shah, 2014, Chapter 24, Section 1, para. 4)

In their book Medina et al., (2019), writes that the typical sales development representative (SDR) spends less than 36% of their day on looking for customers according to a research run by HubSpot in 2018. They found out that 46% of their day was spent on finding leads, collecting contact data, emailing, as well as similar exercises that the sales development representatives should not be focusing on.

Example:

Medina et al., (2019)’s book on pipeline and its success rate / conversion rate:

EXAMPLES OF

- Four outbound SDRs
- 100 activities per activated account (on average)
- 5% of activated accounts move to pipeline
- \$50,000 average deal size
- 30% close rate on deals that enter pipeline

Therefore, if 36% of the day is spent on prospecting (on average), then that means that they activate three new accounts per day – and 240 new accounts each month. This results in each SDR generates \$150 thousand in new outbound pipeline each month, which is 10 times of their monthly pipeline cost.

**Result:** sufficient for the team’s existence but not impressive.

Example figures of conversion rates:

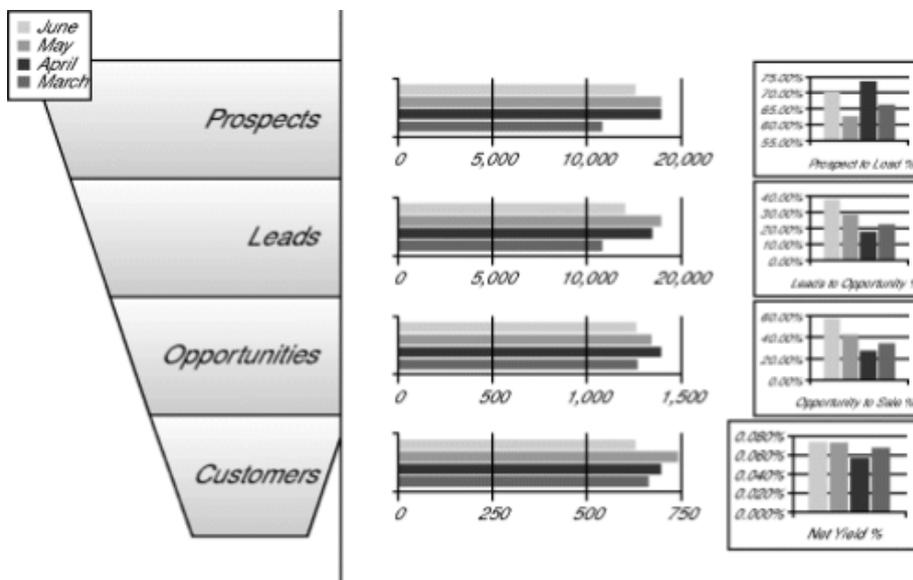


Figure 3. Prospects to customers. (Halligan & Shah, 2014, Chapter 13, Section 1, para. 4)

On the right as miniature tables (from top to bottom)

- Prospect to Lead %
- Lead to Opportunity %

- Opportunity to Sale %
- Net Yield %

PAGE NAME	PAGE VIEWS	SUBMISSIONS	CONVERSION RATE
5 Tips - 10 tip 5	629	2	.32%
5 Tips - 11 resources	507	15	2.96%
5 Tips - 2	3410	172	5.04%
5 Tips - 3 outbound inbound	4073	54	1.33%

Figure 4. Conversion rate: prospects to leads. (Halligan & Shah, 2014, Chapter 11, Section, para 8.)

## 2.2.6 Customer experience

In his article about Gartner’s customer experience (CX) Pyramid (figure below)

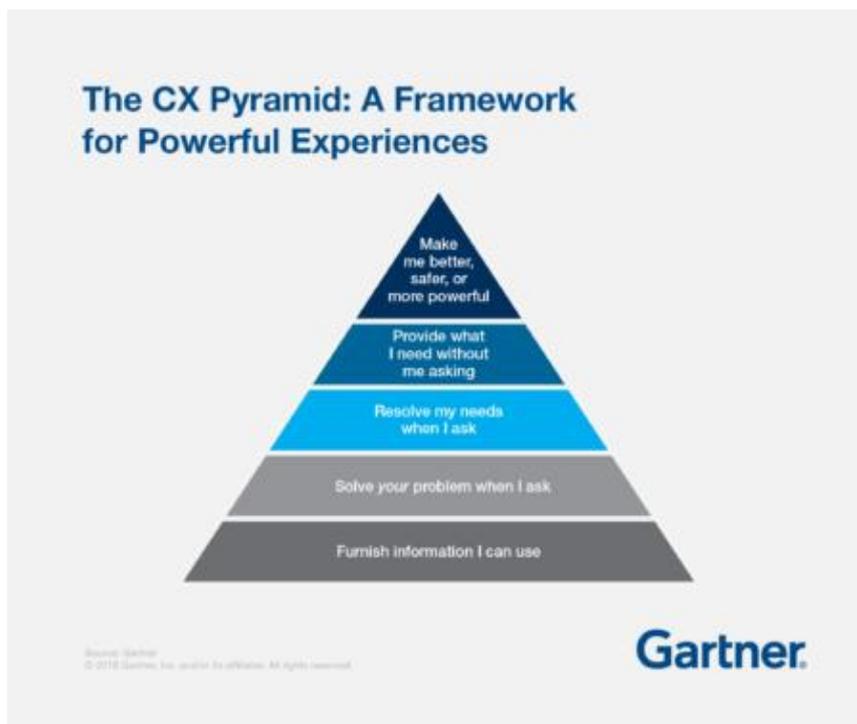


Figure 5. Gartner’s CX Pyramid. (Tincher, 2018)

Tincher (2018) talks about Gartner's five levels of how to respond to a customer. These include communication, responsiveness, commitment, proactiveness and evolution. According to Tincher (2018), the communication level is about how to furnish the information for further use. This comprises the self-service tools and the data that the

companies provide to the customer on their websites. Responsiveness talks about how quickly the company can solve a problem a customer has with minimum costs. Commitment talks about how companies listen to their customers and solve their problems with passion when needed. Proactive companies, on the other hand, manage their customer relations and provide what is needed before being asked. Lastly on the top of Gartner's pyramid there is evolution. Evolution is like Maslow's self-actualization and it aims to make the customer better, safer, and more powerful (Tincher, 2018).

### **2.2.7 CRM benefits**

The use of CRM in the global sales process may vary when you look at the usage from an international perspective. According to Rodriguez et al. (2018), CRM affects different areas of the sales process: opportunity creation, opportunity management, and relationship management. By enhancing communication, creating custom-built solutions for the customer as well as learning more about the customers themselves, these sales-based CRM tools aid the sales professionals to control their unique relationship with their customer base. An essential benefit that these CRM tools bring to the table is the capability to reference customers across the separate divisions of the company and to identify sales opportunities. CRM is not only a technology that benefits organizations, but that it involves people, processes, and different cultures as well (Rodriguez et al., 2018).

The purchasing history is just a small part of what needs to be stored in the CRM tool. You want to see all previous interactions, communication, events, possible complaints, or feedback from the customer. This way it is much easier for the next account manager or salesperson to take control of the customer since they will have an overall understanding of the customer's relationship with the company. Direct benefits of this can be used in the communication with the customer, for example. (Underdahl, 2017)

CRM tools and systems are used to merge information and to apply quantitative techniques to characterize the most attractive message, the optimum marketing mix of product features, the right price points, the best delivery channels, (Jackson, 2005). Additionally, the most suitable level of customer service is selected using CRM tools. This comprises, e.g., the level of the communication between the customer and the organization. The net

profit value (NPV) of the customer can also be met using CRM tools. Based on the NPV, adapted corporate marketing strategies to enhance the customer commitment (Jackson, 2005).

### **2.2.8 The use of CRM within operator sales in Finland**

In modern day's market, telephone operators additionally need to provide something unique to the customer to stay competitive. Additionally, the importance of offering plays a huge role when trying to keep existing clients and acquiring new ones. As a provider you want to specialize and customize your offering to make your product an obvious choice which the customer cannot turn down (Saha et al., 2017).

These tools comprise various features. For example, data from the log which consist of the communication between the customer and the company. The log gives the sales representative the opportunity to look at the previous history of the customer encounters, which can include check-ups, problems or complaints, product changes, or changes in the pricing. It also shows the most important information, the subscriptions, and their prices, which from a sales representative's perspective is where the use of these tools come to play. (Greenberg, 2010)

CRM systems have developed to such an extent that they can predict the customers buying behaviours. The longer the history between the customer and the company is the more precise the product offering will be. Marking offered and sold products also enhances the accuracy of the tool. For example, the tool suggests an up-sale or a cross-sale to the sales representative. This is usually an update or an improvement on the customers product pool. (Greenberg, 2010)

### **3 METHODOLOGY**

This chapter comprises the methodology used in the research.

#### **3.1 Approach**

This chapter will comprise the methodology for this research. The chosen method for the study is the qualitative research method in the form of semi-structured interviewing as the approach. This research method will give the best data for later analysis because of the relaxed and flexible way of interviewing. The semi-structured type of interviewing will help elaborate on the research questions, which will help finding the right answers to the problem statement.

The main steps of a qualitative research presented by Bryman & Bell (2011) was used in the preparing, gathering, and analysing the data. The steps illustrated by Bryman & Bell (2011) includes:

1. General research questions
2. Selecting relevant site(s) and subjects
3. Collection of relevant data
4. Interpretation of the data
5. Conceptual and theoretical work. a) Tighter specification of the research question(s). b) Collection of further data
6. Writing up findings/conclusions

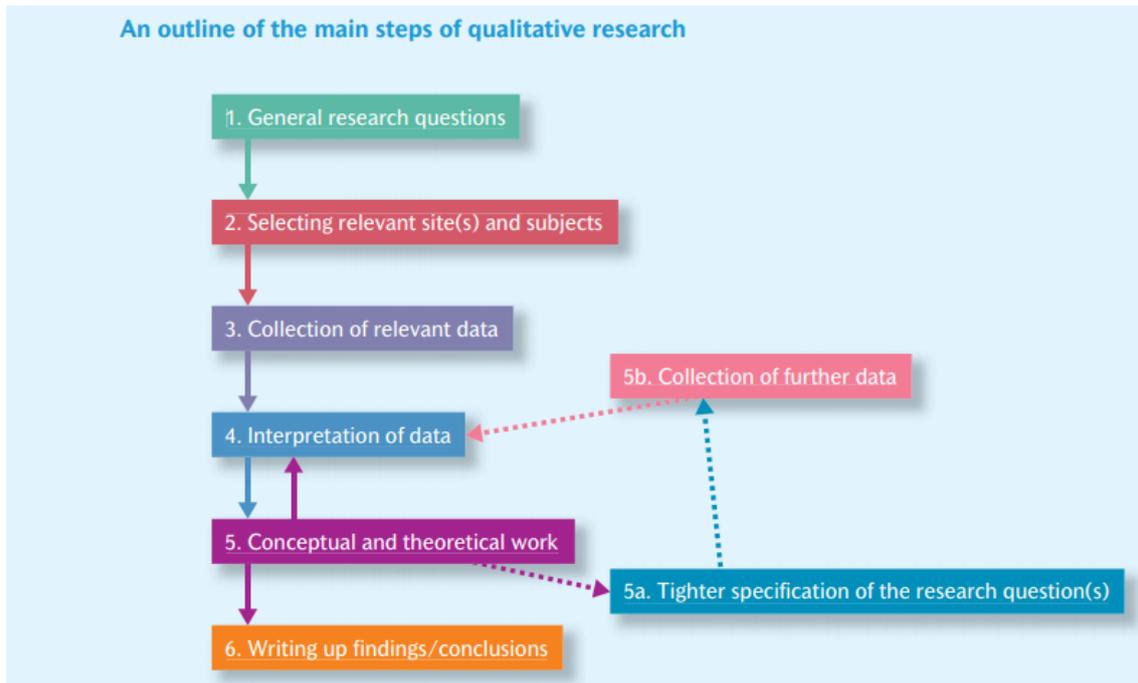


Figure 6. The main steps of a qualitative research. (Bryman & Bell, 2011, p.390)

According to Bryman & Bell (2011), in a semi-structured interview, the interviewer has a list of questions from a specific topic that will be covered. This form of interview will give more space for the interviewee to express their insights on the topic, in i.e., comparison to a structured interview where the questions are more specific and vary less (Bryman & Bell, 2011). In a semi-structured interview, the interviewer can ask follow-up questions that are not on the interview guide based on the answer that the interviewee gives. But mostly the interviews will follow a similar structure, and all the questions on the list will be asked but not necessary in the same order. However, since the qualitative research method is less restrained and more analytical, the participation and perception from the interviewer might influence the results gathered from the interviews. (Bryman & Bell, 2011)

### 3.2 Data collection

The data used in this research was primary data collected by the researcher himself. The interviews were conducted in March 2021 using Zoom due to the COVID-19 pandemic. Firstly, the participant's approval to record the interview and use the data was confirmed using a consent form. The respondents were informed that the recorded material will be erased after the data analysis. The interviews were recorded, and notes were

taken to compare the B2C interview guides answers with the B2B better. The Zoom recording capture was used on the online interviews. A time frame of 15-30 minutes was scheduled for each interview. Each interview guide had 15 questions that were followed in a chronological order.

### 3.3 Sample selection

The participants in the interviews were mostly B2C sales representatives working in the telephone operator field in Finland but also B2B sales representatives and experts in different positions and industries. The total participants in the interview study were five people who varied by age, education and working experience to get versatile answers. The samples were selected as the result of random sampling for the data gathered to be unbiased. These were sales representatives from various companies such as Elisa, Telia, DNA, Gapps, and Salesforce.

*Table 1. Sample selection*

Participant	Age	Experience	Education	Company	Date	Duration
A	37	10 years (treasuring & sales)	M.Sc. Economics	Salesforce	22.03.2021	11 min
B	26	2 years (marketing & sales)	BBA International business	Gapps	11.03.2021	17 min
C	24	2,5 years (sales)	Sports instructor	Telia	24.03.2021	19 min
D	24	2 years (sales)	Medical student (ongoing studies)	DNA	25.03.2021	10 min
E	26	5 years (sales)	M.Sc. Economics	Elisa	08.03.2021	28 min

### 3.4 Interview guide

The interview guide for the B2B CRM experts / sales representatives was structured as follows: 1-5 background, 6-10 CRM-tools, 11-15 possible improvements.

1. Name, Age?
2. Education and Working experience?
3. Working experience within the CRM field?
4. Why do you work within the CRM field?
5. Plans for the future ?
6. What is the main reason for a company to use a CRM tool?
7. Which tools do you/your sales representatives use?
8. Why do they use these tools?
9. Explain the advantages in using them in B2B sales?
10. How does the use of these tools accelerate the sales process?
11. Explain if there are some features that you never or seldom use and the reason for it?
12. From a sales perspective, what could be improved in CRM tools to accelerate sales further?
13. What makes a CRM tool bad (weak) / good (efficient)?
14. Describe your own CRM tool if you could make one, what features would it have to maximize sales, and why? (does not have to be realistic).
15. How do you think that the CRM tools will look like in your industry in the future? (AI, improvements, features, design, UX, UI)

The interview guide for the B2C sales representatives in the telephone operator sector was structured as follows: 1-5 background, 6-10 CRM-tools, 11-15 possible improvements.

1. First Name, Age,
2. Education and Working experience
3. Working experience within the telephone operator sector in Finland
4. Why work in the telephone operator sector in Finland?
5. Plans for the future ?
6. From a scale of 1-5, How often do you use CRM tools for sales purposes in a customer encountering? 1 (never) 2 (seldomly) 3 (sometimes) 4 (often) 5 (always)
7. Which tools do you use?
8. Why do you use these tools?
9. Explain the advantages in using them?
10. How does the use of these tools accelerate your sales?
11. Explain if there are tools that you never or seldom use and the reason for it?

12. From a sales perspective, what could be improved in these less effective, less used tools?
13. From a sales perspective, what could be improved in the more effective, more often used tools?
14. Using your imagination, describe your own CRM tool if you could make one, what features would it have to maximize your sales and why? (does not have to be realistic).
15. How do you think that the CRM tools will look like in your industry in the future? (AI, improvements, features, design, UX, UI)

These interview guides were translated and conducted in either Finnish or Swedish depending on the interviewee's preference. The reason for this was the more specific data that was expected to be retrieved when given the interviewees the opportunity to answer in their native language. The answers were naturally also translated into English from either Finnish or Swedish.

### **3.5 Data analysis**

According to Caulfield (2020), the thematic analysis method is suitable for analysing qualitative data such as interview transcripts or texts. The thematic analysis method was chosen as most suitable for this research since the gathered data is the outcome of two separate semi-structured interviews which results were transcribed.

According to Caulfield (2020), a thematic data analysis method can be separated into different approaches, the inductive and the deductive approach. The chosen method for data analysis was the deductive approach since it best fits the nature of the research. A deductive approach involves coming to the data with some preconceived themes (Caulfield, 2020). The themes being sales, customer relationship management, B2C, and B2B. The difference between a semantic and a latent approach in the thematic analysis method. A semantic approach comprises analysing the specific content of the data, whereas a latent approach comprises expectations hidden in the data collection method. The thematic analysis was semantically approached since the aim was to find out about the interviewees' opinions rather than their assumptions (Caulfield, 2020).

Since the data was conducted using a qualitative research method, no graphs or diagrams were used. The gathering was firstly compared with itself, and the results were analysed

and compared with previous studies (Rodriguez et al., 2018) to see if the data agrees or disagrees with previous studies. Indications were drawn based on the information gathered from the sample selections that were interviewed for the research. Interpretation of the data was done to seek themes and patterns in the answers. The goal was to find similarities and differences and group them. The language, terms, and keywords used by the interviewee were also studied to help finding similarities in the answers. The information gathered from the recordings were transcribed and analysed.

The interviews were analysed by methodically going through and comparing the answers one at a time. Firstly, all the answers gathered from the B2C interview guides were compared separately between themselves, then the same thing was done for the answers from the B2B interview guide. The notes compared to the recordings were also taken into consideration when analysing the data. Secondly, the data gathered from each interview guide category (B2C and B2B) were compared with each other. In other words, the data was analysed in parallel between each collection. Lastly, the conclusions were compared with each other to summarize the results.

### **3.6 Validity & Limitations**

As earlier mentioned, the data used in this study was collected using Zoom's recording feature as well as by note-taking. This way the researcher gained similar data from two different sources, and that enabled verifying the information and checking for differences as well as similarities. This way the data can be considered valid and reliable. The data is valid since the information gathered from the interviews were raw, unfiltered, and directly generated from the interviewee and thereby not changed or polished in any way. The answers that were gathered were honest opinions of CRM experts and sales representatives in both the B2C and the B2B fields. Therefore, supporting the validity of the data. Additionally, the reliability was ensured by choosing a quiet space for the interview to take place to minimize external disturbance. This ensured for the most considered and pondered answers. The results were compared to different theories in various fields such as CRM, sales, and telephone operator sales in Finland to find similarities and support the findings.

## 4 RESULTS

In the thematic analysis (see Appendix) the following themes were detected:

1. **The importance of CRM**
2. **CRM benefits on sales**
3. **CRM improvements**
4. **Disadvantages of CRM**
5. **Future of CRM**

The themes were sought out by seeking accruing keywords and themes in the answers related to the interview guide and the research questions. For example, the CRM benefits on sales theme occurred then the words “easy” “quick” “effective” were frequently found interview guides when comparing the answers.

The results from the semi-structured interviews were put into two separate categories, the B2C and the B2B interview guide. Once all interviews were conducted, the results were analysed by writing down keywords from the answers, and by searching for similarities in the answers which could be sewn together as themes. The aim was to find answers to the research questions mentioned earlier in the text. Similarities and interesting thoughts were also written down to support the claims in some answers.

In the results, Participant A and B represent the B2B experts and sales representatives, whereas C, D, and E represent the B2C sales representative working at various mobile phone operators.

### 4.1 The importance of CRM

From the interviews, it was found out that there were various similarities found when comparing the answers from the B2B and the B2C interview guide.

**The importance of CRM** and why it is crucial for sales reps both on the B2C and B2B side was made clear. Especially the **need to familiarize yourself with and really know your customer** was a pattern in both categories that really stood out.

*“The importance of knowing your client, what relationships they have and how you can serve them in the best way possible. It is also important to know the needs of your customers to be able to succeed and stand out in a highly competitive environment in some other way than in pricing. Therefore, it is important to be able to store data in a smart way to a database which defines the need for CRM” (Participant A)*

Another aspect that clearly showed a pattern was **the importance of data**.

The need for data is crucial since the sales representatives need up to date data to know what has been done, how and when. This was clearly seen in the answer to the question “Why do you use these tools?”

*“To find the correct customer information and get an overlook on the services/products in use. To keep up with the customer history by postings after each customer contact, what was done, whether anything was done” (Participant C)*

*” In order to track sales data, automate email sending and staying up to date with the sales. Helps building the customer portfolio to know what stage your customers are at. Whether they are at the start or end of the sales. Furthermore, it helps you find all the essential data” (Participant B)*

CRM systems were also viewed as important from a **product offering** perspective.

This is related to data because it is the data that enables the sales representatives to find a solution to a problem by offering the correct service or product. CRM tools enables a quick overview on the customer journey so far. The products that they own, have owned, and are likely to own. The AI enables the product offering to be more specific and exact.

*” Simply put it mostly just helps you with the product offering” (Participant D)*

*” It shows basic needs easily, quickly and helps to provide a solution to everything you want regarding customer management.” (Participant E)*

*” Helps with mapping, helps with sales and product offering” (Participant C)*

## **4.2 CRM benefits on sales**

The participants presented various opinions on how the CRM tools can provide help to the sales process and aid the sales representative to find the suitable product offering easily, quickly, and efficiently to the specific need of each customer.

*” The direct benefits of using CRM tools in sales is that all customer data is found in one database or tool. This enables an easier way to control your sales funnel and helps you in finding the most important sales opportunities. It helps the sales rep to focus on the right things at the right time. Modern days intelligence, that is*

*programmed in these tools, have a higher insight of small details which the human necessarily would not notice otherwise” (Participant A)*

*” You know what you should offer thanks to the optimized product offering. You can also see what was last offered to the customer” (Participant E)*

The **automatization** helps the sales representative to focus on selling. It handles all time-consuming processes like standardized tasks. For example, figuring out the current products and services that the customer possesses and what they cost.

*” Standardized tasks such as mailing orders can automatically be taken care of using CRM tools. The AI automatically helps generating more targeted sales offerings” (Participant B)*

*” Helps in making quick decisions about the products that can and should be offered to the customer that the customer might need. There is no need to do so much thought work yourself. The system helps to create and map the overall picture on itself” (Participant D)*

The **customer history** and the data that the tools offer is not only why the participants considered the CRM tools as necessary, it also plays a great role in the benefits that it offers. It helps the firm to stay up to date on the customer events in every department that handles customer relationships.

*” Stays on the map of every stage in the customer journey and helps the sales representative to stay in contact with the customer so that no customers are left spinning immensely. You can see the phase where the customers are at in real-time and stay up to date with them more efficiently by using a CRM tool” (Participant A)*

*” Previous entries regarding the customer relationship helps the sales representative to stay in control of their customer pool, monitor sales data and keeping things simple” (Participant B)*

*” Customer history benefits are e.g., if you see that the customer has previously owned a product then you know that it can be offered again.” (Participant C)*

*” You can easily know the background of the customer and what has happened before. It speeds up the sales process and helps you to notice any differences when the customer's history is known. Knowing the history helps you to find places to make a sale more efficiently. It is usually more reliable data than what the customer gives.” (Participant E)*

**Timesaving** and **objection response** is the last pattern that was discovered as a major benefit in using CRM tools in sales for both B2B and B2C representatives.

*” Saves time, the conversation is made more natural through tools which boost sales.” (Participant C)*

*” Objections can more easily be prepared for by using the information provided by the system.” (Participant E)*

### 4.3 CRM improvements

The view on **which improvements could be added to CRM** systems to make them support the sales representatives more efficiently were similar in the results from both the B2C and the B2B side. The most common keywords were **clear, simple, organized,** and **easy.**

These all has to do with user interface (**UI**) and user experience (**UX**) service design.

*” Large amounts of data that needs to be simplified and refined so that it becomes as easy to use as possible. Concealment of the unnecessary in the UI, highlighting the essential functions and making them as easy to use as possible requires service design. Clearer, faster outlining of the crucial data, clearer identifying what the problems are and what to focus on” (Participant B)*

An interesting suggestion of improvement was the idea of integrating **voice guidance** to CRM tools. This idea was proposed by a B2B interviewee.

*” Voice-guided, knows the user and can provide what is needed (the essential information) to the sales representative. e.g., call this customer or send this offer to this client.” (Participant A)*

The last pattern for CRM improvements argued for a need of **centralizing features** from various CRM tools into one great system so that fewer tools would be needed.

Integrating various tools into one or enabling communication between tools from different suppliers would enable **more precision,** a **greater diversity of features** as well as **versatility to the tool,** which would make it radically **more comprehensive.**

*” Make CRM tools communicate with each other. Centralize the features of many tools into one. E.g., A change in the billing info would automatically integrate into the other tool” (Participant B)*

*” Make sales directly through various tools not just one tool” (Participant C)*

## 4.4 Disadvantages of CRM

The **lack of trust** in the automatization can be seen as a **disadvantage of CRM** even if it earlier was mentioned as a benefit. Some rely on them knowing the customers best which can develop scepticism towards some automated features. Especially relying on your own decision making rather than the tool can sometimes seem like a more secure option.

*” Sales reps do not always trust the automatization and intelligence when making some conclusions/decisions but rather rely on their own decision making. The sales rep assume that they know their customers and their situations the best despite data pointing something else. If no data is collected, then the CRM tool has zero added value.” (Participant A)*

## 4.5 Future of CRM

A lot of **AI** was brought up regarding the **future of CRM**, both from the B2C as well as the B2B representatives' perspective. The improved AI could potentially **increase automated features, ease the product offering and increase the precision and quality of the product offering**. They would also look **cleaner, be easier to use and work faster and more efficient**.

*” Artificial intelligence deepens and brings conversational artificial intelligence to the surface more and more. Speech recognition related to artificial intelligence is likely to be featured in the future, much like Apple's Siri or Android's Alexa. The future's CRM tool would be able to take care of the user's everyday CRM issues with the help of speech recognition. E.g., by creating sales opportunities, adding products and pricing” (Participant A)*

*” Simplified, more user-friendly, as fast, and easy to use as possible. Artificial intelligence will bring the utilization of customer data to the next level. AI will be able to analyze phone behavior, location information, etc., so that customers' privacy is not violated. Therefore, the quality of sales will improve, the offers will be of higher quality and more carefully considered. The interaction between the business and the customer will be more flexible and easier” (Participant E)*

## 5 DISCUSSION & CONCLUSION

This chapter is going to focus on analysing and comparing the results to theory and literature presented in the theory chapter. The goal is to find out how each theme connects to

previous statements and how the claims can be supported by theory. This chapter will also elaborate on the choice of method and the researchers' suggestions for further research. Lastly, a conclusion of the study will briefly be discussed.

## 5.1 Discussion regarding the resulted themes

### 5.1.1 The need for data

**The importance of CRM** theme presented in chapter 4.1 show that the need for CRM tools can have various reasons. As earlier mentioned in the theory chapter and according to (Rodriguez et al., 2018), companies spend millions of dollars on sales technology (including CRM technology) with the aim of improving the company's productivity, communication, and customer relationship.

**The need for up-to-date data** was another significant factor highlighted in this theme. In the theory chapter about how companies desire customer data sourced from a range of information sources and customer interfaces Peltier et al. (2013), states that the data is obligated to be collected and stored in an easily accessible format for the information from various sources to be obtainable to all members of departments that handle the data.

This is supported by Participant A, who claims that it is important to know your client, what relationships they have, and how you can serve them in the best way possible. Participant A continues that it is important to know the needs of your customers and store data in a smart.

As Peltier et al. (2013) states, systems **enable the development and maintenance of relationships** using data. Data can be collected and shared with relevant stakeholders, so that information can be disseminated, and **relationships strengthened**.

This is supported by the claims presented in the results chapter 4.1.

There Participant C says that CRM helps with mapping, sales, and product offering. Participant D argues that CRM helps with tracking sales data, automate email and with staying up to date with sales. It also helps building the customer portfolio, keeping up with your customers and to discover the essential data.

**The product offering aspect** was the last aspect presented in the theme about **the importance of CRM**. As stated in chapter 4.1, Participant E argues that a good CRM system enables the sales representatives to find a solution to the problem by offering the correct service or product. CRM tools give a quick overview on the customer journey so far. The products that they own, have owned, and are likely to own. The AI enables the product offering to be more specific and exact. This basically means that up-and cross-sales opportunities that the AI enables.

This is supported by Guillet (2020) who defines up-sales as updating a product or a service by improving the product or service. Up-selling can also be seen as the attempt to persuade customers to purchase a product or service at a higher level (Guillet, 2020), with the aim to offer a product or a service that is richer in its characteristics or features rather than the original one. Also, cross-selling is a way for AI to enhance the product offering. Also, Warren (2017) argue that effective cross-selling include drawing the attention of the clients to additional needs, and allowing you to sense, serve, and satisfy the needs of your existing clients and maximize the full potential of your client base, (Warren, 2017).

Participant E indicated that CRM tools help in displaying the needed data fast and easy but also provides a solution to every aspect regarding the customer management.

Participant C said that CRM helps with mapping, sales, and product offering.

The importance of a high-quality product offering is supported by Jobber et al., (2019), who claims that many customers leave companies for better offers and benefits found elsewhere despite active marketing efforts that are designed to attract new customers.

### **5.1.2 How CRM tools help the sales process**

The **CRM benefits on sales** theme argues for the various benefits that CRM tools can provide to the sales process in both the B2B and the B2C sector. The first claim about easy access to data that enables suitable product offering in the results chapter 4.2 can be supported by Peltier (2013), who argues that businesses want client data gathered from a range of information sources and customer interfaces. Peltier (2013) also states that the

data must be collected and stored in an easily accessible format, so it becomes obtainable to all members that use it.

The need for the quickness in obtaining data is supported by Kolis & Jirinova (2013) in their article about the differences between B2B and B2C CRM. As stated in the theory chapter, Kolis & Jirinova (2013) writes that customers know what they want and how to demand quality service. They are used to being serviced quickly and frequently with everything. Usually customers desire shopping under one roof.

Oksanen (2010) argues that customers can be served more efficiently and individually when the information is available to everyone necessary. This can be supported by the results found in chapter 4.2 (para. 1) when looking at the citations where Participant A argues that the direct benefits of using CRM tools in sales is that all customer data is found in one database or tool which enables an easier way to control the sales funnel but also helps the sales representative in finding the most important sales opportunities. Participant E argues that CRM tools that enable an optimized product offering specific to the customers need which make the sales process a lot faster and effective.

The automatization factor presented in the **CRM benefits on sales theme** argues for the freedom which CRM tools provide to the sales representatives. This means that the sales representative can fully focus on selling as the data keeping and routine tasks are handled by the CRM system. The study shows that automatization handles all time-consuming processes like standardized tasks. For example, figuring out the current products and services that the customer possesses and what they cost. This is supported by the claim in the theory chapter where Jackson (2005), argues that CRM has proven its functionality and importance in sales. He writes that many sales focused organizations have developed CRM systems in the form of technologies, mainly focusing on sales force automation and call centre support.

This theory is again supported by the citations found in the results where Participant B argues that “standardized tasks such as mailing orders can automatically be taken care of using CRM tools. The AI automatically helps generating more targeted sales offerings”.

This claim is supported by Participant D's citation, which says that CRM tools "Helps in making quick decisions about the products that can and should be offered to the customer that the customer might need. There is no need to do so much thought work yourself. The system helps to create and map the overall picture on itself".

**The CRM benefits on sales** theme show the probably biggest benefit that CRM offers to the sales processes, and that is the customer history and the data that the tools offer to the sales representatives. It helps them to stay up to date with the customer through every department that handles customer relationships. Participant A, B and C argues in chapter 4.2 how previous entries regarding customer events in a database eases the job of a sales rep.

These results are supported by the theory where Greenberg (2010) claim that the longer the history between the customer and the company is, the more precise the product offering will be. This statement is supported by the other claim by Greenberg (2010), who writes that the log enables a look at the previous history of the customer encounters. This includes all previous, check-ups, problems or complaints, product changes or changes in the pricing.

The last benefit pattern that was found in the theme about **CRM improvements** was the timesaving and objection response benefit. According to the results presented in the last paragraph of chapter 4.2, Participant C argues that CRM tools can save the sales representative time, which enables a more natural conversation with the customer, which again helps the sales representative to find the sales opportunities. According to Participant E, a great benefit of CRM tools is that the information they offer usually helps to counter objections regarding sales offers since the sales rep is more prepared with hard data directly from the system.

Like Jobber et al. (2019) presents in their questions about understanding your customer better:

1. Who is important in the buying decision?
2. How do they buy?
3. What are their choice criteria?

4. Where do they buy?
5. When do they buy?

By understanding your customers' needs and their preferred way to buy in advance, you are more prepared for the customer encounter. However, this can be seen as more realistic and more commonly seen procedure regarding the B2B buying process rather than B2C buying process. This is since the B2B buying process is way more routinized and predictable than the B2C buying process (Kotler & Armstrong, 2017). The B2B buying process is also presented by Jobber et al. (2019) as more rational, complex, and long-term oriented. On the other hand, as earlier mention, the B2C decision-making process can be seen as a problem-solving or need-satisfaction (Jobber et al., 2019).

### **5.1.3 CRM development**

**The CRM improvement's** theme shows a pattern that the improvements correlate with the benefits that the study already demonstrated. According to the study, a CRM tool could be made clearer, simpler, and more organized as well as easier to use. This indicates that the improvements found from the study has to do with the UI and the UX of these tools. Voice-guidance (Participant A) and centralized features (Participant B) which means making various CRM tools into one great system via integration was also presented as suggestions for improvement.

Also, enabling communication between tools from different suppliers was argued to enable a more comprehensive, precise, diverse, and versatile tool for the use of sales representatives. An example of this result is found in Participant B's citation where the interviewee answered that large amounts of data need to be simplified and refined so that it becomes as easy to use as possible. The unnecessary needs to be hidden, and the essential functions need to be highlighted more clearly. This result is supported by Boulding et al. (2005), who talks about CRM as a strategic tool for managing created value, intelligent use of knowledge and technology, acquiring customer data, and distributing information to stakeholders that are seen as relevant to the organization.

#### 5.1.4 Negative sides of CRM

The **disadvantages of CRM** theme present for the lack of trust in the automatization. This can be seen as controversial since automatization was found as a relieving benefit from the eyes of a sales representative in the mobile operator sector in Finland. However, the researcher found a pattern of scepticism towards CRM tools in various situations. For example, when the sales representative believes that they know their customers best regardless of what data the system provides. In chapter 4.4 Participant A argues that some rely on their own decision making rather than the tool since it sometimes would seem like a more secure option. An example for this theme is displayed in the citation by Participant A in chapter 4.4, where he says that sales reps do not always trust the automatization when making decisions even though the data might point to something else.

This can be supported by Kotler & Armstrong (2017, p. 192) defines the buying centre of a company as all the individuals and units that play a role in the purchase decision-making unit. A doubt in the automatization by a member of the buying centre could damage the buying process. However, this is mostly related to the B2B sector and its buying behaviour.

#### 5.1.5 Expectations of CRM

The **future of CRM** can be seen as a mixture of featured suggestions and improvements in CRM and the benefits that the modern-day's CRM tool provide its users. As earlier mentioned in the theory chapter, Kolis & Jirinova (2013) argues that customers know what they want and knows how to demand quality service. They are used to being serviced quickly and frequently in all matters. This hypothesis indicates that there is always room for improvement regarding customer satisfaction.

The main characteristics regarding the future of CRM was the development of AI which could possibly be taken to the next level. According to the results, this could potentially mean that the automated features would take to furthermore advanced levels. This would indicate extensive features that would be more precise. This could lead to a higher standard regarding the quality of the product offering, which could lead to more satisfied

customers. The study shows that future CRM tools also would look cleaner, be easier to use, work faster and be more efficient in the future.

Citations by Participant A and E in chapter 4.5 works as examples for this theme.

*” Artificial intelligence deepens and brings conversational artificial intelligence to the surface more and more. Speech recognition related to artificial intelligence is likely to be featured in the future, much like Apple’s Siri or Android’s Alexa. The future’s CRM tool would be able to take care of the user’s everyday CRM issues with the help of speech recognition. E.g., by creating sales opportunities, adding products and pricing” (Participant A)*

*” Simplified, more user-friendly, as fast, and easy to use as possible. Artificial intelligence will bring the utilization of customer data to the next level. AI will be able to analyze phone behavior, location information, etc., so that customers’ privacy is not violated. Therefore, the quality of sales will improve, the offers will be of higher quality and more carefully considered. The interaction between the business and the customer will be more flexible and easier” (Participant E)*

## **5.2 Summarizing the results with the research questions**

### **5.2.1 Research question 1: Which CRM features benefit the sales process the most and what can be improved?**

When looking at the combination of themes the importance of CRM and CRM benefits on sales, we find answers to this research question. All themes argue for various reasons why CRM is important, how it benefits sales and what features that can be improved.

What resulted as features that benefit the sales process was the tools capability to find the suitable product offering easily, quickly, and efficiently to the specific need of each customer. The automatization, which helps the sales representative to focus on selling was also considered a great beneficial feature. It was explained to handle all time-consuming standardized processes for the sales representative. For example, figuring out the current products and services that the customer possesses and what they cost.

The customer history and the data that the tools offer was also seen as great beneficial features of CRM tools. It was argued that it supports the firm in staying up to date with customer events in every department that handles customer relationships. Timesaving and objection response was also seen as beneficial features regarding CRM tools.

As Rodriguez et al., (2018) argues, the benefits that CRM bring to the sales process. According to Rodriguez et al., (2018), CRM affects various areas of the sales process. For example, the opportunity creation, opportunity management, and relationship management. By enhancing communication, creating custom-built solutions for the customer as well as learning more about the customers themselves sales-based CRM tools support the sales professionals to control their relationship with their customer base.

Another mentionable benefit that CRM offer to the sales process is the capability to reference customers across the separate divisions of the company and to identify specific sales opportunities effectively (Rodriguez et al., 2018). The results also showed that improvements could be done by centralizing features (Participant B) which would mean combining the features of various tools into one great tool. This would make the tools more precise, diverse, and versatile and therefore more comprehensive. Another improvement suggestion that resulted from the study was the development of automated features as well as voice-guidance support (Participant A).

The improvement suggestions gathered from the study also argued for improvements in CRM tools to make them clearer, simpler, and more organized as well as easier to use. These are the improvements regarding the user interface (UI) and user experience (UX).

### **5.2.2 Research question 2: How will the future of CRM look like?**

The results gathered in the Future of CRM theme presents estimations on this matter. The advanced development of artificial intelligence regarding CRM was brought up the most. The B2C as well as the B2B representatives anticipated the same predictions. AI was believed to increase automated features, ease the product offering and, as Participant A and E mentioned in chapter 4.5, increase the precision, and enhance the quality of the offers. This is believed to result in rigorous tools with wide-ranging features which could lead to a higher standard regarding the quality of the product offering, which could lead to more satisfied customers.

The study shows that future CRM tools also would look cleaner, be easier to use, work faster and be more efficient in the future. Kolis & Jirinova (2013) state that customers know what they want and are generally able to demand high quality service at a fast phase. This shows that there is future demand for improvements regarding customer service and satisfaction.

### **5.3 Choice of method**

The method chosen for this research worked well regarding the aim and the purpose of the study. The method chosen was the qualitative research method with semi-structured interviews as the approach. The interviews were easy to conduct and recorded via Zoom. The interaction between the interviewer and the interviewee worked well despite all interviews being conducted remotely. Results may have varied if the interviews would have been conducted in person. Thus, due to the COVID-19 pandemic, this was not an option for this study.

The original idea for the sample selection in this study was to randomly walk into mobile operator shops and ask for permission to interview some of the workers present. The B2B samples were supposed to be selected based on recommendations. However, due to the pandemic, the sample selection was made randomly based on the first set of people that the researcher was able to arrange a meeting with, which ended up working well after all. However, the results would possibly vary somewhat if the sample selection would have been carried out according to the original plan. The research was somehow biased since all who were asked to participate were contacts recommended to the researcher.

The participants demographics could have varied more such as, gender, age, and so on. Also, the number of participants and the face-to-face interviewing possibility would have surely resulted in a different way.

### **5.4 Ideas for further research**

More samples representing a wider range of demographics in both the B2B and the B2C sector could give more insight on the topic. Face-to-face interviews conducted in a natural

setting could enable a more humane approach to the study. This could potentially result in more specific results and thoughts. Survey questionnaires without an interviewer could also work as a method for gathering data. It was found not necessary for an interviewer to ask the questions in a form of interview. Further research could look deeper into different tools, and interviews with the creators of these tools could be conducted to find out more specific information regarding the construction of these tools and the reasons behind the choices in e.g., features, UI, UX, and AI.

Since the samples representing the B2C sector were all working in the mobile operator sector in Finland, the study is quite limited. Further studies on the topic could be done comparing various industries in different countries in various parts of the world, which would make the research a lot broader and comprehensive.

## **5.5 Conclusion**

This aim of finding the benefits that CRM offer to the sales process in both the B2B and the B2C (mobile operator sector) was successful. The research questions about benefits, improvements and the future of these tools were also successfully answered (see Appendix). However, this study is very demographically limited regarding the samples with size, variation, and geography. Therefore, it is difficult to draw any determined conclusions in any wider perspective. Different companies use different tools with different features. Some tools that one company in a specific field use might have features which vary vastly from another tool used in another industry. This was proven true regarding this study in both the B2B and the B2C sector. The tool helps you to keep up with what, why, how, and when a product or service has been sold to or bought by the customer. Entries in the customer events page (history or customer journey) helps the next salesperson to know what has been done. This gives a head start and saves a lot of time and effort. CRM tools help to get a quick overlook on the customer, the products that they own and have owned, and at what price they are. If there is a discount on the product or service or if the customer is currently paying full price. AI helps with an automated and precise product offering which eases the work of the sales representative if the sales representative finds trust and decide to use these tools for their intended purposes.



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# APPENDIX

## Thematic analysis

RQ1: Which CRM features benefit sales the most and what can be improved?

RQ2: The future of CRM within the telephone operator sector in Finland?

### Why we need CRM?

- A: Importance of knowing your client. What relationships they have and how you can serve them in the best way possible

- A: important also to know the needs of your customers if you want to succeed and stand out in the highly competitive environment in some other way than in pricing. Therefore, it's important to be able to store data in a smart way to some database which defines what crm is

- B: Track sales data. Automate email sending. Stays up to date with the sales, customer portfolio. You know what stage your customers are at. Start or end of sales. keeps you on track. Find all the essential data of interest

B: marketing benefits

C: customer information, services/products in use, postings after customer contact, what was done, whether anything was done.

D: Helps you with the product offering

E: shows basic needs easily and quickly and to provide a solution to everything you want from customer management

Advantages and suggestions for improvement in using CRM tools (sales perspective)

### Benefit

### Improvement

### USED

A:

All customer data in one place (database or tool).

- Enables an easier way to control your sales funnel and the most important sales opportunities.

- Helps the sales rep to focus on the right things at the right time.

- Enables an easier way to control your sales funnel and the most important sales opportunities.
- Helps the sales rep to focus on the right things at the right time.
- Modern day intelligence higher the insight which the human necessarily would not notice otherwise

B:

- Standardized tasks can sometimes be taken care of automatically using crm tools.
- More intuitive with an improvement in the mobility of the tools
- The large amounts of data that needs to be simplified and refined so that it becomes as easy to use as possible
- concealment of the unnecessary in the UI, highlighting the essential functions and making them as easy to use as possible which requires service design
- clearer, faster outlining of the crucial data, clearer identifying what the problems are and what to focus on as well as what to do to succeed in the best way.

A: voice-guided, knows the user and can provide what is needed and give the essential information to the sales representative. e.g., call this customer or send this offer to this client. The tool would know the price at which the customer is willing to buy.

- helps automate mailing order.
- Stays on the map of where any stage is and stays in contact so that no customers are left spinning. You can see the phase where the customers are at in real time and stay up to date with them better

B:

Previous entries on customer relationship management

- stays in control of the customer pool, sales data monitoring, simplistic.
- make crm tools communicate with each other. Centralize the features of many tools into one. E.g. change in billing info would automatically integrate into the other tool

C: what products the customer uses, how much it uses them, how much the customer pays for them

- saves time, the conversation is made more natural through tools. Boost sales.
- Gets awareness of the customer's products (as a whole)

D: helps to make quick decisions about the products that can and should be offered what the customer might need.

- There is no need to do so much thought work yourself. The system helps to create / map the overall picture.

**E:** The quality of sales will improve, the offers will be of higher quality and more carefully considered, the interaction will be more flexible and easier. Helps with objections.

**C:** Make sales directly through various tools not just one tool.

**E:** Clarity, more efficient, easier to use, more options for measures to realize the services directly from the tool. For example, there would be no need to call technical support to handle the matter.

**D:** Better and more versatile features that bring coverage.

organized, clear, straightforward, Price of products broken down and total price of products.

**C:** Price and validity of benefits. How the customer has been in contact with the company for the last 5 times, for example. Receipts of what has been done with dates clearly marked.

- Customer history benefit, e.g., if the formulas have been so can be offered again. Helps with mapping, helps with sales and product offering.

- Bidding was more targeted. Finding the Price Level, precise.

**D:**

Automatically more targeted sales.

- What the customer has had and what he currently has (history). You can also see real-time data from other operators. Of all ICT services. What is there and at what price.

- Could provide optimized product offering to ease the work of the sales representative.

**E:**

You know what you should (optimized product offering) offer, see what was last offered (history). Know the background and what has happened before. When the Customer's history is known, it speeds up the sales process.

- easier to find product offerings, e.g. if the customer have had 5 subscriptions but nowadays only 3. Note the difference. Know the history and find places for a sale more efficiently.

- More reliable data than what the customer gives. Makes it easier to find sales paths when there is data to rely on. Objections can be more easily prepared for with the information provided by the system.

**C:**

Mandatory entries in the customer events history. Helps to know what has been done with customers.

**E:** AI related improvements. Improvements in product offering (assisting in proposals).

- One who would be fully able to take all available information about all the systems related to the customer (synchronize info from various CRM tools). For example, if the customer

has bought a new TV and covered the channel packages so you could see and be able to offer the products.

## Disadvantages in using CRM (reasons for rarely used features):

A:

Sales reps do not always trust the automatization and intelligence when making some conclusions/decisions but rather rely on their own decision making.

- The sales rep assume that they know their customers and their situations the best despite data pointing something else.

if no data is collected then the added value of a crm tool is 0.

B:

- Mailing systems are not used, phone contact preferred instead of Gmail.
- marketing tools are not used.

- C:

- A contract system, which with you can create the contract yourself and send it to the customer to read. Used only if there is a fault in other systems.

- D:

- Map system (not comprehensive enough), Not reliable from the customer's point of view

- E:

- old as well as slow tool.

## Future of crm:

A:

Artificial intelligence deepens and brings conversational artificial intelligence to the surface more and more. Speech recognition related to artificial intelligence. Like Siri, Alexa. Would take care of the user's everyday crm issues for you with the help of speech recognition. Eg creating sales opportunities, adding products and pricing.

This ideal tool would know the price at which the customer is willing to buy.

B:

AI improvements and product offering.

C:

More versatile, new features, artificial intelligence will bring a variety of customer contact options, as well as expand the encounter, call requests and other small things which will make it easier for the employee to do.

D:

Relatively similar in style, the types of privacy are tightening. Is the right to retain data if the customer terminates the service. Preserving history is narrowing.

E:

The interface looks pretty much the same, trying to streamline the analysis done by the program and bringing its analysis to the attention of every vendor in an easy way. If the data decreases, then the analytics needs to be more efficient. Not visible in the UI but in the background. Simplified, more user-friendly, as fast, and easy to use as possible. Artificial intelligence brings the utilization of customer data. Artificial intelligence analyzes phone behavior, location information, etc. So that customers' privacy is not violated.

The quality of sales will improve, the offers will be of higher quality and more carefully considered, the interaction will be more flexible and easier.

## CONCLUSION:

- *different operators use different tools with different features. Some tools that one operator use might have features that the other operators' tools do not have.*
- *The tool helps you to keep up with what, why and when a product or service has been sold to or bought by the customer.*
- *entries in the customer events page helps the next sales rep know what has been done, the history of the client.*
- *CRM tools help to get a quick overlook on the customer, the products that they own and have owned and at what price they are. If there is a discount on the product or service or if the customer is currently paying full price.*