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Sales Management Tool for ABB Oy

Metropolia University of Applied Sciences

Master's Degree

Degree Programme in Business Informatics

Master's Thesis

11.11.2022

Abstract

Author: Kimmo Kalaja
Title: Title of the Thesis
Number of Pages: 91 pages
Date: 11 November 2022

Degree: Master of Business Administration
Degree Programme: Business Informatics

Instructor: Kevin McIntire, Senior Lecturer

The objective of this thesis was to create a performance management tool for the Area Sales team of ABB Oy, Motion Local Sales Unit. This was to be done by researching what sales management metrics are currently considered to be most effective, and to apply them into a tool, possibly a CRM dashboard.

The research family of this thesis is a applied, mixed field study. Data was collected in three rounds. The methods used in data collection consisted of stakeholder interviews and researching existing tools. The focus in literature research, carried out during research of existing knowledge, was in KPI's used in sales management.

The outcome of this thesis was a Salesforce.com dashboard, a CRM system used by ABB. The final proposal consisted of 20 components. The components presented KPI's that were based on current state analysis and research of existing knowledge.

The newly created sales management tool was taken into use at ABB Oy. The findings were shared with the target organization, and also with other ABB sales teams and the Global Process Owner of Opportunities and Accounts. Recommendations and an action plan was provided for future developments of sales management and tools.

Keywords

Sales management, customer relation management, CRM, dashboard, KPI

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Glossary

ASM	Area sales manager. A sales employee responsible for end user business in a defined geographic area.
BA	Business area. Organization structure used at ABB. The group consists of four business areas (Motion, Electrification, Industrial automation and Robotics).
BPO	Business process owner.
CPI	Customer Performance Indicator. Indicator used by customers to measure the performance of their suppliers.
CRM	Customer relation management. May refer to an approach to account management, often also used to mean CRM systems.
EAD	Expected Award Date. A field on the Salesforce.com Opportunity object, meaning date when the customer is expected to make the decision.
KPI	Key performance indicator. Quantifiable indicator used for measuring performance.
KR	Key Result.
LSU	Local sales unit. ABB country level unit that sells a business area's products to their domestic market.
MODP	Drives Products division at ABB
MOIM	IEC LV Motors division at ABB
MOLM	Large Motors and Generators division at ABB
MOSD	System Drives division at ABB

NPV	Net Price Variance. KPI that compares sales prices of current year to the ones from previous year
VFD	Variable Frequency Drive

1 Introduction

Over the past 25 years, CRM systems have become popular and developed and can now provide plenty of data about employees' activities. There are numerous key performance indicators that have been traditionally used for sales work: such as the number of sales calls a sales employee has done in a year. With modern CRM systems, these activities are now more visible to management than ever before. Managers can use reports and dashboards to see the performance in real time.

However, greater visibility does not automatically mean greater control (Jordan & Vazzana 2012, 6). Sales managers in today's world are often missing the knowledge of relationships between cause and effect. Exactly how many customer visits on a certain topic will cause the sales reach a certain target? The purpose of this thesis is to take the sales management tool to a next level and answer such questions. In this thesis, a tool used for measuring the performance of an area sales team at ABB Oy, Motion business area is created, based on research of the current state, best practices and current sales management theory.

1.1 Business Context

The case organization of this thesis is ABB Oy, local ABB Group company in Finland. ABB Oy has a very long history in Finland, and so has its sales activities. Strömberg Oy started in 1889, was acquired by Swedish ASEA in 1987 and became a part of ABB Group in 1988 when ASEA merged with Swiss company AG Brown Boveri & Co. Today, ABB Group has 140 000 employees, 5000 of which are located in Finland.

From the late 1990's, CRM systems became common in sales organizations, also at ABB Oy. Salesforce.com was rolled in globally at ABB in 2015. Salesforce.com is currently the #1 CRM system in the world. Matti Alahuhta has described selecting Salesforce.com when managing Kone Oyj to be the best IT decision in his career (Alahuhta 2015, 61). The data entered in this system has revolutionized the opportunities to measure the performance of individuals of sales organizations.

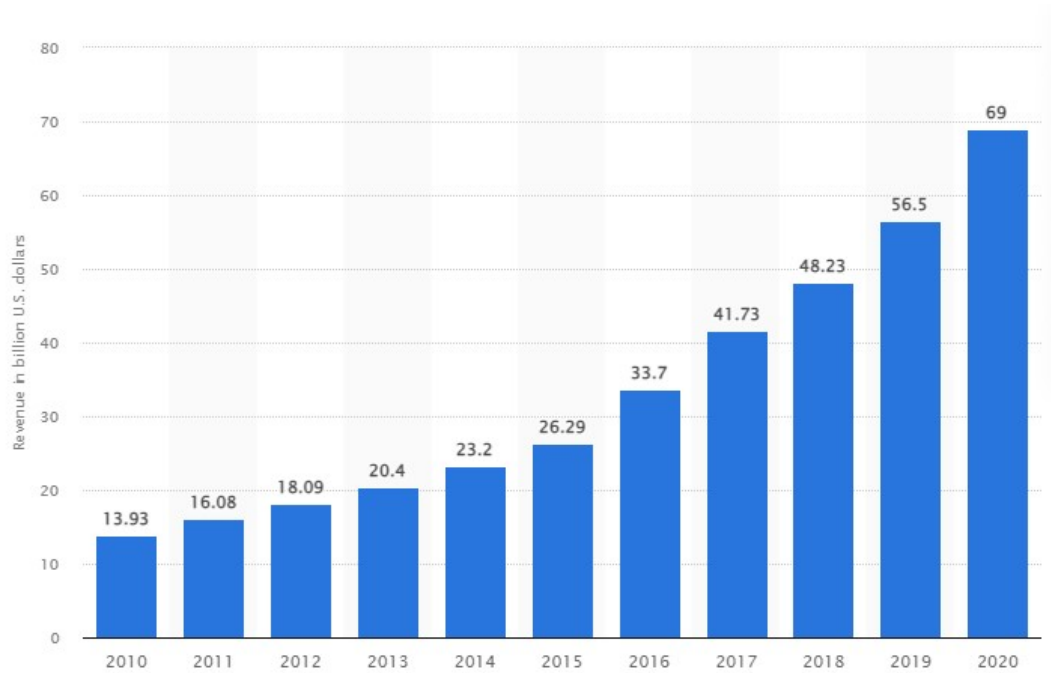


Figure 1. Customer relationship management (CRM) software revenue worldwide from 2010 to 2020 in billion U.S. dollars (Gartner 2021).

The figure above shows the revenue of CRM systems, such as Salesforce.com, from 2010 to 2020. The development of revenue reflects the increase in the CRM usage, and value and meaning of CRM data in sales management. The rollout was carried out incrementally, first taking the most typical CRM objects, such as visit reports, into use in front end sales teams of local sales units in each country. Reporting and dashboards were used immediately, first to show the adoption statistics and common CRM metrics. Later, more advanced features were taken into use. In 2019, ABB switched into using the Lightning Experience user interface. Some traditional KPI's to measure sales success include, for example, the order intake, profit margin and number of customer visits.

1.2 Business Challenge, Objective and Outcome

In the case organization, there is no shortage of data or KPI's available for managing a sales team. The business challenge is to find out what metrics will be most effective in today's technical trade business, with the newly developed sales activity data available from current CRM systems. The importance of metrics is that besides performance management, they will direct salespeople's daily work. Like the saying goes, you get what you measure. The vast amount of data can feel overwhelming to personnel. There

is a clear need to create a tool that will also show the team what is important. Moreover, the challenge is that this performance management process should be aligned with ABB's strategy and strategic targets, a fact that the new sales tool must support.

Reports and dashboards have been created in Salesforce before at ABB, also for the area sales team that is the case organization of this thesis. Usually this has been based on previous KPI's and experiences. However, for the case team of this thesis, this has never yet been done by first researching the latest (and classic) management theory, interviewing managers of other teams and other stakeholders, reflecting the findings on the data opportunities in the system, and creating a measurement tool only after that. This structured, systematic approach will be applied in this study.

Accordingly, the objective of this thesis is to find out what metrics are the most critical to the success of the area sales team, based on today's sales management theory, and apply this knowledge into a modern CRM data environment for *developing a tool used for measuring the performance of an area sales team at the case organization*.

The outcome of the thesis is *a performance measurement tool for the area sales team*, based on completely re-thought key performance indicators, which will not just improve visibility, but control of the teams' sales efforts.

1.3 Thesis Outline

The case team of this thesis is the area sales team of ABB Oy, Motion business area, local sales unit Finland. This team is mainly selling electric motors and frequency converters to Finnish end users. These companies are typically operating in the pulp & paper, metals & mining, chemical, oil and gas industries. Channel sales management is also a part of this team, with one employee dedicating full-time effort in developing ABB's electric motor and drive business with electrical wholesalers and system integrators.

This thesis was done by using Applied action research method. Current sales management tools used for managing the target team were studied first, and several stakeholders were interviewed for this end. Business literature and best practice on sales management were explored to address the gaps and latest theory for re-thinking the current tools. Thus, the first step of the thesis was the current state analysis. Existing Salesforce.com reports and dashboards were studied, but also managers from other teams were interviewed to gain a wider perspective about sales management at ABB

Oy. Also, one area sales manager was interviewed, not only to get information about what tools they are using, but to also identify their experiences of the benefits. He, and also the channel manager who is also a part of the target team, were interviewed when the initial proposal was built. The purpose of these discussions was to get development ideas from the sales employees. Manager of operations, including customer support, were also interviewed. Operations are usually using different Salesforce.com objects in their daily work than front end sales, mainly Case Management. A close cooperation is needed between operations and sales teams, and KPI's from both teams must support one another.

At this point of the study, interviews were also held with three outside sources. First, an electric wholesaler, a customer from ABB Oy perspective. It is important to provide them an excellent customer experience, and in order to achieve this, information was collected about how they measure efforts of their suppliers. This knowledge was later used to define customer KPI's (later referred as CPI's), and applied to the KPI's of the sales team. Second, a representative from Salesforce.com was interviewed to get ideas for both KPIs and also for dashboard layouts. Lastly, a representative from Accenture was also interviewed for the same reasons.

After that, modern theory of key performance indicators used for sales management was studied and the applied into the business context. Both inputs, from the theory and from the current state analysis, were used as contribution to brainstorming and co-creation of the solution with the key stakeholders. After the proposal was built, it was presented to the ABB Oy area sales manager and sales director who was the company side supervisor for this thesis. The purpose was to get ideas for some final adjustments and then validate the sales tool. The tool was also presented to the ABB Motion BA global business owner of Salesforce.com, in order to bring the findings globally available so that LSUs of other countries may benefit from it.

1.4 Key Concepts

CRM is an abbreviation for Customer Relation Management. This abbreviation is sometimes used as the practice of customer relation management in general, but in the context of this thesis, it means a CRM system, an IT tool used for managing customer relationships. Typical features of a CRM system features include sales pipeline management, reporting, dashboards and marketing automation.

2 Method and Material

In this section, research approach used for this thesis, action research, is described, as well as research design and data collection plan.

2.1 Research Approach

The research family of this thesis is applied, mixed field study. The research approach used for this thesis is applied action research. An action research project is situation specific and not meant to generate universal knowledge (Coughlan & Coughlan 2002). An action research report is also expected to present extrapolation to a broader context and articulation of usable knowledge (Coughlan & Coughlan 2002). This applies to this study: the purpose is to create a tool for one specific team and not a general one that may be used with any sales team in any company. Many stakeholders are involved in the process, with some of them being involved more than once during the research. Existing knowledge, particularly in literature, are also studied and then applied for development of the solution.

It is not uncommon that managers cannot tell the difference between management and non-management or actions. Managing can be described as planning, directing, and controlling the activities of a manager's subordinates (Loen 1964). This also applies to sales management. Modern CRM's can provide tools to all of the above: planning customer activities, directing daily work and controlling the activities. The current state analysis concentrated on the methods of sales managers and directors are currently using for planning, directing and controlling the work of sales personnel. While sales tools can help with all of them, much of this research concentrates on the controlling part of sales management. Elements of controlling may be defined as measuring, evaluating and correcting (Loen, 1964). Data available from CRM systems is most useful particularly in measuring and evaluating. Therefore, the current state analysis was done by studying current sales management tools, but also by discussions with other ABB managers.

In this study, interviews were an important part of the research process. Stakeholders of several kinds are to be involved: salesmen, whose performance is to be managed with the tool, other managers and directors to give their take on KPI's and sales management in general. It was important that the tool must support the work of everybody in the team.

The largest part of sales force often consists of core performers and not top performers, and it is not in the best interest of the company to neglect them (Steenburgh & Ahearne 2012). Attitude of the sales force to Salesforce.com and other sales management tools was also researched: only a motivated sales force will use the systems properly, and thus generate good data quality. Customer's point of view is of extreme importance, and it is also to be researched with an interview. To get an out-of-the-box perspective, two other stakeholders outside of ABB were interviewed: an Account Executive from Salesforce.com and a Client Account Leader from Accenture.

This study was situation and team specific, but the findings are likely to prove to be helpful to other sales managers of ABB. During the validation, the ABB Motion's global Business Process Owner (BPO) of Opportunity and Account Management was also be involved during the validation and building the final proposal. Final proposal was also be shared to sales managers and directors who were interviewed during the research.

2.2 Research Design

Before creating the research design, it was carefully studied how applied action research, such as this thesis, should be carried out. A model was selected and data available and needed for each phase of the research was examined. A more detailed research design and data collection plan are presented below.

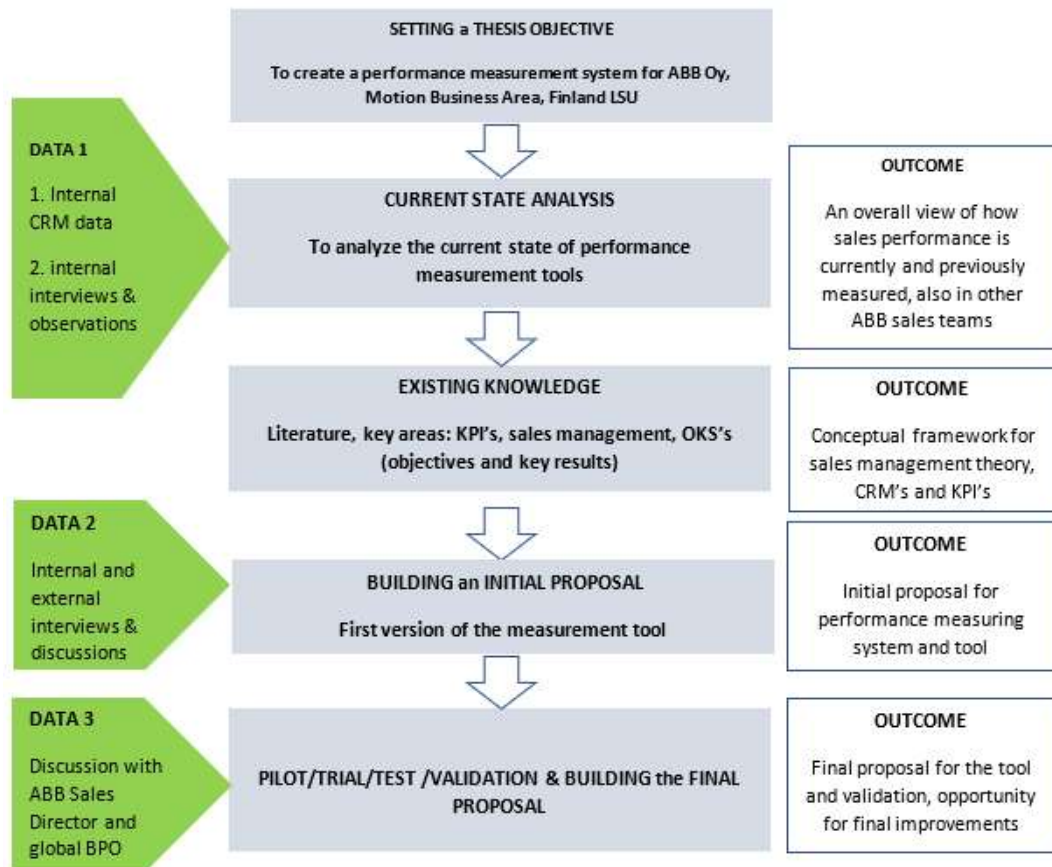


Figure 2. Research design used for this thesis.

Figure 2 shows how the thesis was carried out. First, an objective was set to creating a performance measurement system for ABB Oy, Motion Business Area, Local Sales Unit Finland, with completely re-thought KPI's, and then the tool was to be created to support these KPI's.

The next step was to analyze the current state of the existing performance measurement tools in Salesforce.com dashboards. The current state was investigated by analyzing data from the tools and systems and by interviewing sales directors from other ABB business areas, to investigate their sales management, KPI's and if they were using Salesforce or other tools for this purpose.

Next, business literature and best practice in relation to sales management were explored. There is abundance of academic and business studies available about sales management, measurement and customer relationship management. Search for ideas

and best practice focused on the following topics: sales management, strategy, performance management process, CRM's and KPI's.

After exploring theory and best practice, the initial proposal was built. More stakeholders were to be interviewed for the proposal co-creation, including three external sources for new perspective. When they had given their input for the final proposal and its validation.

2.3 Data Collection and Analysis

Data for this thesis was collected from multiple data sources: Salesforce.com system, discussions with ABB managers and salespersons, some end customers and distributors, and the ABB responsible Account Manager from Salesforce company.

Data from Salesforce was mostly quantitative, but also qualitative. For example, there are several free text fields on the Salesforce Visit Report object. Discussions and interviews provided qualitative data, but in some cases also gave information about quantitative metrics, such as if salespeople were measured by the number of customer visits before Salesforce.com rollout.

Besides quantitative and qualitative metrics, also measuring efficiency was of particular interest in this thesis. It showed how much support functions' time is needed to achieve a certain amount of turnover, and to evaluate if these resources are spent wisely.

Table 1 shows the details of data collection used in this study.

Table 1. Data collection rounds 1-3 used in this thesis.

	Participants / role	Data type	Topic, description	Date	Documented as
Data 1, Current state analysis					
1	Salesforce.com data	CRM data	Evaluation of current performance measurement tools	31.1.2022	SFDC reports and dashboards, field notes, MS Excel files
2	Interview with ABB IAMA Division Sales Director	Benchmarking	Performance measurement of IAMA sales team	28.2.2022	MS Teams recording, field notes
3	Interview with ABB EL Business Area Sales Director	Benchmarking	Performance measurement of EL sales teams	8.3.2022	MS Teams recording, field notes
4	Discussion with Area Sales Manager, ABB Oy	Discussion	Current sales tools	7.3.2022	MS Teams recording, field notes
Data 2, Proposal building					
5	Area Sales Manager; ABB Oy	Discussion	Input for the initial proposal	20.3.2022	MS Teams recording, Field notes
6	Operations Manager, ABB Oy	Discussion	Co-creation of initial proposal	25.3.2022	Field notes
7	Channel Manager	Discussion	Input for the initial proposal	31.3.2022	MS Teams recording, Internal reports
8	Customer/distributor	Face-to-face Interview	CPI's (Customer Performance Indicators)	31.3.2022	Field notes
9	Account Executive of Salesforce.com	Face-to-face or MS Teams Interview	Input for the initial proposal	10.4.2022	Field notes
10	Client Account Leader, Accenture	MS Teams interview	Input for the initial proposal	11.4.2022	Field notes
Data 3, Validation					
11	ABB Sales Director	Discussion	Validation, evaluation, final improvements	10.05.2022	Field notes
12	Discussion with Area Sales Manager, ABB Oy	Discussion	Validation, final improvements	10.5.2022	MS Teams recording, Field notes
13	ABB Global Business Process Owner	Discussion	Evaluation of initial proposal	11.05.2022	Field notes

Table 1 shows the details of data collection used in this study. Data was collected in three data collection rounds, first of which being the current state analysis, Data 1. The current sales tools were examined in Salesforce.com and other systems. Sales directors from two other ABB business areas were interviewed for benchmarking their current performance management sales tools. This collection also included a discussion with one of the area sales managers of the target team. The intention was to see how they feel their work was being evaluated, and also to see how beneficial they see the CRM data in their customer work.

The next data collection, Data 2, was for proposal building. The area sales manager, and also channel manager from the team were discussed with, to study what features they would appreciate in the future sales management tool. In this round of data collection, a wide perspective was pursued by interviewing people with different roles: operations manager of ABB Oy, whose subordinates are mainly working in reactive job roles, with Case Management being the primary Salesforce.com object they are using in their daily work. The customer experience is of ultimate importance to a sales company, and therefore Customer Performance Indicators (CPI's) were studied by interviewing a customer from an electric wholesaler. Also, an Account Executive from Salesforce.com was interviewed to get a wider perspective of KPI's different companies are using.

The third and final data collection round, Data 3, was done for validation. Three people were selected for the discussions: first, the ABB Oy Sales Director who gave the topic for this thesis and who has created several successful sales tools himself. The same Area Sales Manager was also involved during this data collection round, to see if the tool is considered to be beneficial by him. Finally, the global ABB Motion Business Owner was involved at this point, to possibly get ideas for some final adjustments but also to share the findings of this study, so that they could be used in other ABB countries as well.

Thus, semi-structured interviews and discussions were the primary data source, most of which were held in Microsoft Teams, instead of face-to-face at ABB premises due to the global pandemic situation. The interview questions and structure were designed before the interviews and can be found in more detail in Appendix 1.

3 Current State Analysis of Sales Tools of the Area Sales Team

This section discusses the current sales tools and best practices used for sales management at ABB Oy, Motion Local Sales Unit Finland. The existing sales management tools in CRM were analyzed, and also the current sales management practices of two other ABB Business Areas. The benefits what the area sales managers are getting from the current tools were also researched.

3.1 Overview of the Current State Analysis

The goal of the current state analysis was to research the current sales tools, how they were used and how management and salespeople benefitted from them. The current state of sales tools and usage was also studied from two other ABB Business Areas.

First, the existing Salesforce.com sales tools were analyzed. Salesforce.com had been used at ABB since 2015, and there were already numerous reports and dashboards that have been used for sales management. The latest CRM and sales management theory had not been investigated recently, to find new ideas for KPI's that modern CRM's can support in performance management of sales teams. Three of the existing dashboards were identified as being relevant to the area sales team: Motion myyntiraportti, Motion tekemisen mittarit and Motion loppuasiakas demand. These dashboards, their components and background reports were investigated.

Second, the current state was investigated by interviewing two sales directors from other ABB Business Areas, Electrification and Industrial Automation. ABB's strategy has made the group's Business Areas and Divisions more independent than before. Previously, Salesforce.com and the sales process was managed by one local organization, but that has changed. Therefore, the current sales tools had been developed independently, and there was no good knowledge about how the sales process of different Business Areas were being managed.

Third, the practices and benefits of the current sales tools used in Motion Business Area were analyzed. The purpose of these tools is to manage the team's activities and performance by using data, but also the provide the salespeople with good information about what they should concentrate on. This data may also be useful in daily customer work, giving salespeople actual data of response times of customer support, for example.

The analysis provided the information about the state of the current tools are, also in other Business Areas, the practices of how they are being used and how the managers and salespeople benefit from them.

3.2 Overview of the Current Salesforce.com sales tools

The first step was to analyze what sales tools are currently being used at ABB Oy, Motion Business Area. Three dashboards were found to be relevant: Motion Sales Report, Motion Activity KPI's and Motion End Customer Demand. They were providing data for different purposes, some aimed mainly for sales managers.

Before diving into the analysis of the current tools, it is important to mention that on a dashboard, data may be visualized in many ways: Horizontal bar charts, vertical bar charts, stacked horizontal bar charts, stacked vertical bar charts, line charts, donut charts, metric charts, gauge charts, funnel charts, scatter charts and tables or lists.

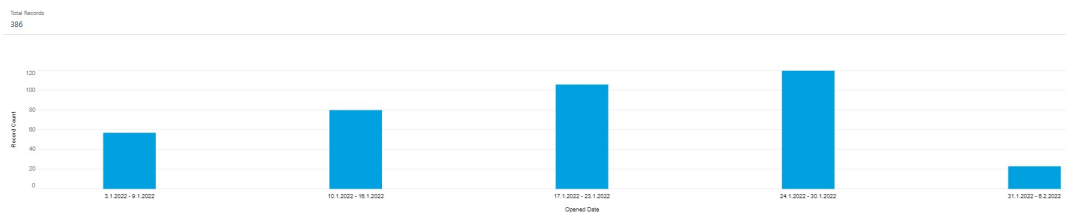


Figure 3. A vertical bar chart presenting Salesforce.com data.

The above figure shows how the number of certain records may be presented by calendar weeks on a Salesforce.com dashboard component.

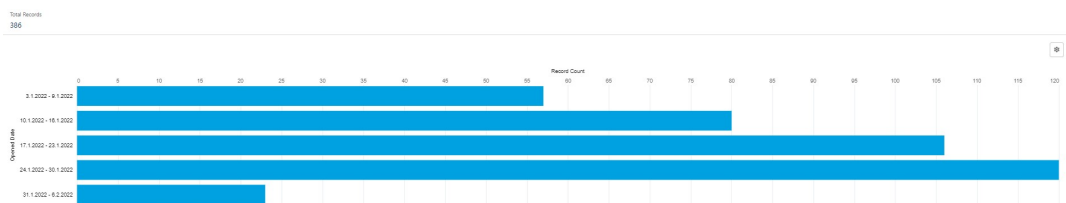


Figure 4. The same data as in Figure 3, presented as a horizontal bar chart.

In Figure 4, the same data is presented as a horizontal bar chart. Different chart types can be selected based on what is the most useful way to present the records on a Salesforce.com dashboard component.

3.3 Dashboard: Motion Sales Report

This dashboard had been designed to be used by both salespeople and sales managers. Motion Sales Report dashboard contained 20 components, which was the maximum for a Salesforce dashboard.

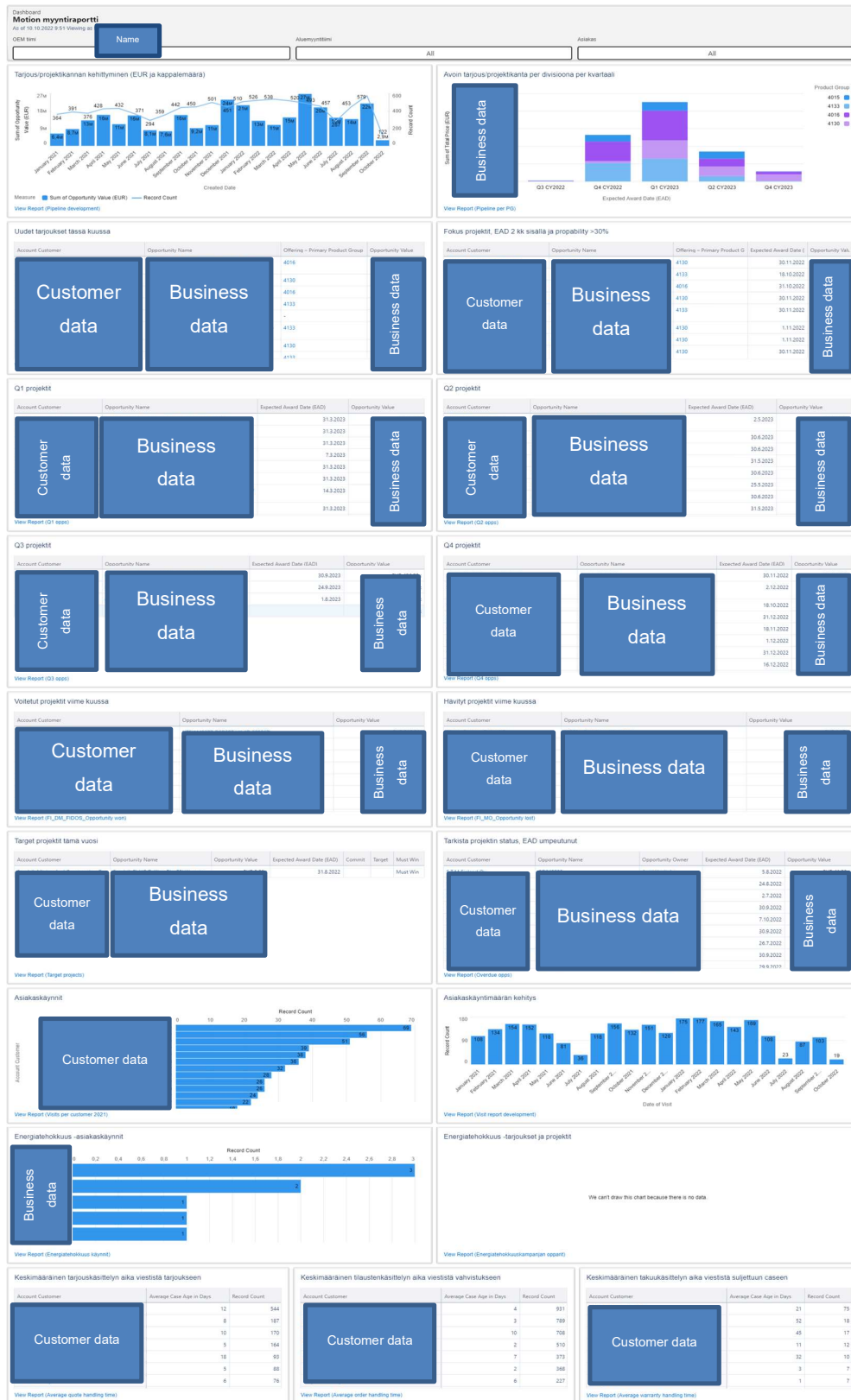


Figure 5. Motion Sales Report Dashboard.

As seen in Figure 5, the dashboard shows data from all salespeople from the ABB Local Sales unit. Three filters are available on the dashboard: OEM Sales team members, Area Sales team members and Account Customer. By using these, salespeople could filter the data so that they could see the big picture of their responsibility areas or everything for a certain customer.

Users can see the results in more detail by viewing the background reports of different Dashboard components. They can also pre-filter the results by clicking for example a certain bar on a horizontal bar chart.

3.3.1 Pipeline management components

The sales pipeline is managed in Salesforce.com with the Opportunity object. The fields of these records give important information about the customer, channel, industry usage, opportunity value, expected award date and so on.

The first pipeline management component on the dashboard is called Development of quotations and projects. The background report of this dashboard component gives Opportunity records as values, filtered by record created date (starting from the previous year), Opportunity owner (everybody in the sales organization, also in OEM sales and sales support), and customer GUID number. The purpose of the latter is to focus only on the key customers. Results are shown on the dashboard component in both sum of Opportunity values and record count of Opportunity records. Values are presented as a vertical bar chart and the record count is a curve.

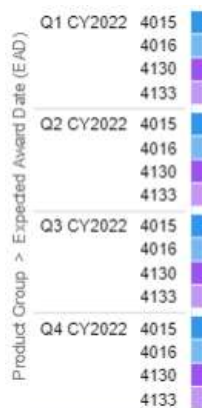


Figure 6. Open quotations and projects by division and Quarter bar chart.

As seen in Figure 5, Open quotations and projects by division and Quarter is a horizontal bar. The purpose of this component is to show the Opportunity records for MODP, MOIM, MOLM and MOSD divisions separately for each Quarter of the current year. As each division brings their own financial results, it is important to follow that each division had a healthy sales pipeline.

Hot projects is the component showing Opportunity records with Expected Award date within the current and next month, and with winning probability of over 30 %. When this dashboard is filtered down to individual salespersons' level, he or she is easily able to identify the Opportunities that require follow-up by using this component.

The next component is Target projects for the current year. An Opportunity may be flagged with Target checkbox. These Opportunities have a very high priority and require special follow-up and support from management.

There are also four components for Q1, Q2, Q3 and Q4 projects for the current year. These four components show all open Opportunity records with Expected Award Date value in a specific Quarter of the current year. The results are shown as a list of Opportunities, sorted in descending order by Opportunity value field.

REPORT ▾
Overdue opps ✎ Opportunities

Fields > Outline Filters 5

Filters ▾

Add filter... 🔍

Show Me
All opportunities

Expected Award Date (EAD)
Current FY (1.1.2022 -
31.12.2022)

Opportunity Status
Any

Probability
All

INCLUDE ROWS MATCHING
((1 AND 2) AND 3) AND 4 ✎

1	Expected Award Date (EAD)	less than TODAY	🗑️
2	Closed	equals False	🗑️

Figure 7. Filters set to identify overdue Opportunity records.

Figure 6 shows some of the filters that were used on “Check the Opportunity status, EAD in the past” component. The filters are used to identify open Opportunity records with Expected Award Date field value in the past. Motion Business Area has a policy of zero overdue Opportunity records, meaning that every Opportunity should be closed before the Expected Award Date. Alternatively, this date field may value may be changed, if the customer is postponing the decision from the previously expected date. The results are presented as a table on the Motion Sales Report dashboard.

There is also a component dedicated for Won projects last month. The background report gives Opportunities marked as Won, with date filter “LAST MONTH”. The results are shown as a table of Won Opportunities, sorted in descending order by Opportunity value field.

Similarly, there is a component called Lost projects last month. The background report gives Opportunities marked as Lost, with date filter “LAST MONTH”. The results are shown as a list of Lost Opportunities, sorted in descending order by Opportunity value field. It is to be noted that this list does not contain Opportunities marked in Cancelled status.

3.3.2 Activity management components

On the Motion Sales Report dashboard, there are two components for customer activities. Both are related to the Visit Report object in Salesforce.

The first dashboard is called Customer visits. The background report of this component gives Visit Report records as results, filtered by Date of Visit (being within Current fiscal year), Visit Report record owner and customer GUID numbers. The results on the dashboard are shown as a horizontal bar chart by customer, in descending order by the number of visits. By filtering the dashboard down to individual salespersons’ level, one can easily see which are the customer companies they are visiting most.

Development of customer visits is the component showing the total number of Visit Report records by month as a vertical bar chart, starting from the previous year. The number of visits is a common KPI for salespeople, and with this component, they and their managers can see whether they are meeting this target or not.

3.3.3 Other components

Open Cases in Sales Support is the component showing Case records, filtered by Email to case recipient sahkokaytot@fi.abb.com, status (not closed or solution provided) and customer GUID number. The results are shown as a table on the dashboard. With this component, it is easy to see all open cases the back end support team.



Figure 8. Filters of Average time from RFQ to quotation component.

Average time from RFQ to quotation is one of the many components in the current Motion Sales Report Dashboard. The background report gives Case records as results, filtered by Opened Date field (Current fiscal year), status (equals Solution provided or Closed), Email to case recipient sahkokaytot@fi.abb.com, customer GUID number and subject (filtering out cases from ABB's contact center). The dashboard component shows the results as a table with three columns: Account Customer, Average Case Age in Days and number of case records for the particular customer. The results are sorted in descending order by record count.

Average order handling time is another component in the Motion Sales Report Dashboard. The background report of this component is very similar than the one for Average time from RFQ to quotation component. The email recipient filtering is done by the customer support address kotimaanmyynti@fi.abb.com, and there is also an

additional filter for Business Area (equals MO), to filter out order cases from other Business Areas. The dashboard component shows the results as a table with three columns: Account Customer, Average Case Age in Days and number of case records for the particular customer. The results were sorted in descending order by record count.

Average warranty handling time is another component in the Motion Sales Report Dashboard. This component and background report are also similar to the one used for quotations and order handling, except for the email recipient filter. On this background report, the Motion warranty email box address Sahkokaytot.takuu@fi.abb.com is used for filtering the data. The dashboard component shows the results as a table with three columns: Account Customer, Average Case Age in Days and number of case records for the particular customer. The results are sorted in descending order by record count.

Three components for development of quotation average time, average order handling time and average warranty handling time. The results are shown on the dashboard as vertical bar charts, by calendar month.

3.4 Dashboard: Motion Activity KPI's

Another dashboard used by the Area Sales team is the Motion Activity KPI's dashboard. This sales tool is mainly serving the data needs of sales management. With this one, the managers can see the development of number of visit reports and opportunities (both in record count and value in euros). This dashboard consists of the following 20 components.

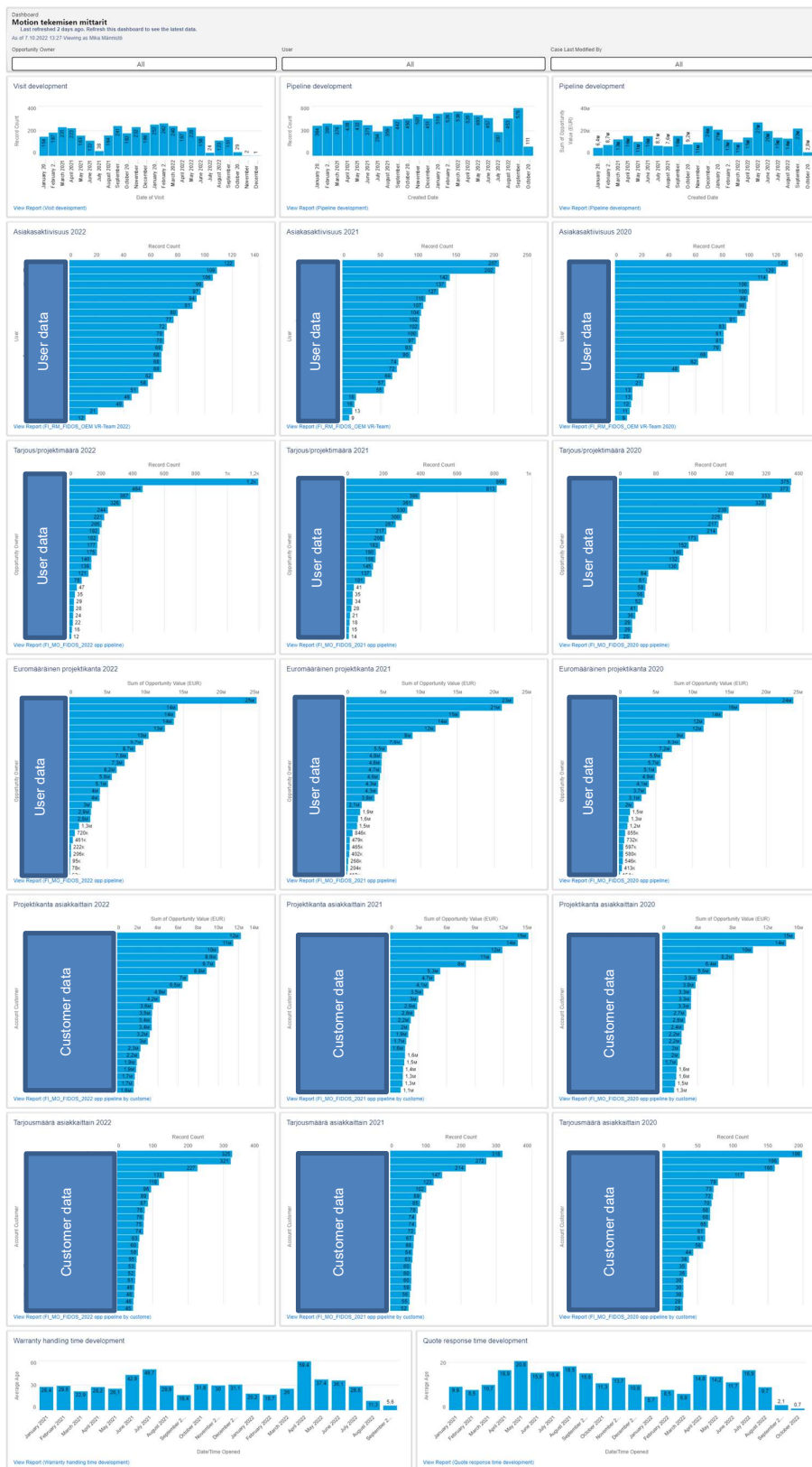


Figure 9. Motion Activity KPI's Dashboard.

As seen in Figure 9, Motion Activity KPI's dashboard can be filtered in three ways: First, team of the Opportunity Owner (Area sales, OEM Sales, Back End Sales). This filter allows sales managers to see the big picture of the performance of a certain team. The second filter is User, which also filters the results on a team level. The difference is in the records given as results: the Opportunity Owner field filters the Opportunity records, while filtering by User gives Visit Report Team Members as results.

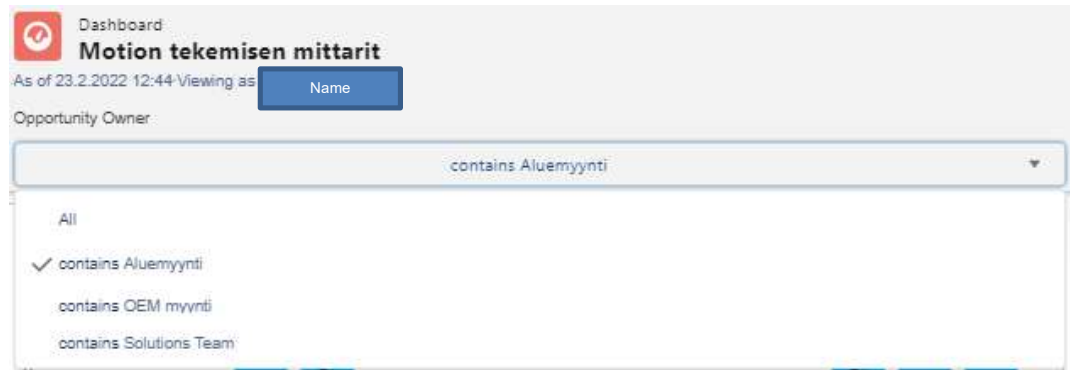


Figure 10. Filtering options: Opportunity Owner drop menu on Motion Activity KPI's dashboard.

Another filter is Case Last Modified By, with selections of individual Back End Sales Team Members. By using this dashboard filter, a sales manager is able to see Case data created by Back End Sales team members.

More than one filter can be used simultaneously. For example, the manager of the Area Sales team can use both Opportunity Owner and User filters at the same time, and seeing both Opportunity and Visit Report related data in a single view.

3.4.1 Pipeline management components

Pipeline development #1. The background report gives Opportunity records as the results, filtered by Opportunity owner. Results are shown as record count, as a vertical bar chart, by month. It is to be noted that unlike the Motion myyntiraportti, this report cannot be filtered by customer.

Pipeline development #2. The background report gives Opportunity records as results, filtered by Opportunity owner. Results are shown in total value of opportunities, as a vertical bar chart, by month.

Three components for following the development of the number of quotations or opportunities were created during three years: 2022, 2021 and 2020. The background report gives Opportunity records as the results, filtered by fiscal year and Opportunity owner field. Results are shown as horizontal bar charts by user (Opportunity Owner) on the dashboard.

Three components for following the development of the total value of quotations or opportunities were created during three years: 2022, 2021 and 2020. The background report gave Opportunity records as results, filtered by fiscal year and Opportunity owner field. Results are shown by customer as horizontal bar charts on the dashboard. Results are sorted in a descending order by total Opportunity value.

Three components for total number of quotations were made to customers during years 2022, 2021 and 2020. The background report gives Opportunity records as results, filtered by Opportunity Owner and Created Date fields. Results are shown as horizontal bar charts on the dashboard, by customer in a descending order by the number of records.

3.4.2 Customer activity components

Visit development is the component that gives visit report team member records as the results, filtered by team members. Results are shown on the dashboard as a vertical bar chart, by month of visit.

Three components for customer activities for years 2022, 2021 and 2020 show the number of customer visits made by each salesperson during the mentioned years. The background report gives visit report team members as results, which means that if more than one salesperson attended the visit, both were counted as customer visits. The results are shown as a horizontal bar chart, by salesperson, sorted in descending order by the number of customer visits.

3.4.3 Response time components

Warranty handling time development is the component that gives Case records as the results, with Case age field data, filtered by Email to case recipient (the warranty email

address Sahkokaytot.takuu@fi.abb.com). The development of handling times is presented as a vertical bar chart on the dashboard, handling time by month.

Quote response time development is the component that gives Case records as results, with Case age field data, filtered by Email to case recipient (the warranty email address Sahkokaytot@fi.abb.com). The development of handling times is presented as a vertical bar chart on the dashboard, handling time by month.

3.5 Dashboard: Motion End User Demand

This dashboard was designed to give an overview of the upcoming End User and Distributor Opportunities for Motion Business Area. Besides the Opportunities created by the Area Sales team, the case organization of this thesis, the ones created by Service division are also presented in Figure 11.

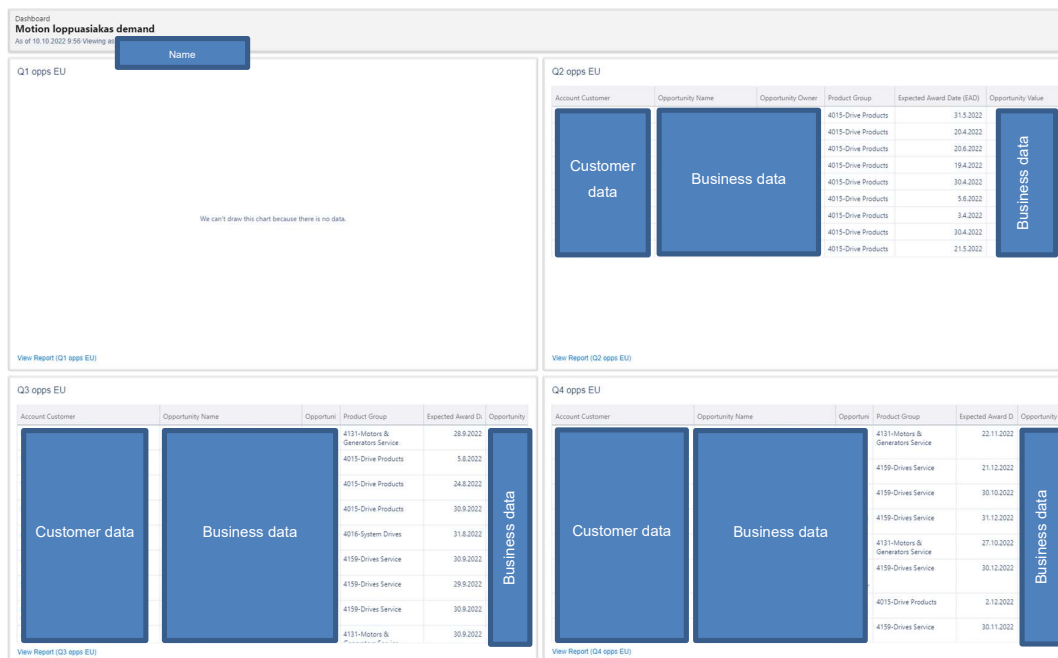


Figure 11. Motion End User Demand Dashboard.

This cross-functional data may give valuable customer information for the Area Sales team to help them keep up to date about what is happening with each customer.

Dashboard
Motion loppuasiakas demand
 As of 7.3.2022 10:59 Viewing as Name

Q1 opps EU

Account Customer	Opportunity Name	Op...	Expected ...	Product Group	Oppo...
------------------	------------------	-------	--------------	---------------	---------

Figure 12. Columns of an Opportunity table from Motion loppuasiakas demand Dashboard.

Data is presented as four components, each showing Opportunities with Expected Award Dates for one fiscal year quarter. The component format is a table, sorted by Opportunity Value in descending order. Each row of the table has an individual Opportunity record, and columns presented are Account Customer, Opportunity Name, Opportunity Owner, Expected Award Date, Product Group and Opportunity Value. As some of the Opportunity Owners are from the Service organization, it is useful to see their names on the Dashboard. This makes it easy to ask for more information, if needed.

3.6 Usage of current sales tools

Salesforce was rolled out at ABB in 2015. At that time, the local electric motors and drives sales teams were part of RM Division, which also included Robotics. The target organization is still quite similar to it today.

Reports and dashboards in Salesforce.com were identified as a valuable tool for both management and salespersons soon, and early versions were quickly taken into use in different teams of ABB.

3.6.1 Sales tool usage in Motion Area Sales team

The three mentioned dashboards are the active ones used for monitoring the teams' performance and also to provide valuable data to the salesforce. One of the three Area Sales Managers was interviewed for this thesis in order to investigate the actual usage of Salesforce data and other sales tools.

The general feedback of the user experience was that information that he needs is hard to find. This feedback confirms the need for a new sales tool. More specific data needs

were investigated in more detail in a later interview, organized for getting development ideas for the initial proposal building.

“I am using a Salesforce.com dashboard to follow Opportunity records with Expected Award Date within the next 30 days”. (Area Sales Manager)

The ASM was using two Salesforce dashboards for his daily work: Motion Sales Report, and one that was developed specifically for him. The latter was a legacy dashboard that had not been updated, and some of the background reports were not working anymore. The most important Salesforce object he was following was Opportunities, with a focus the ones that are closing soon (Expected Award Date field set in near future).

The usage of other sales tools than Salesforce.com was also covered in the interview. The ASM was following actual sales and revenues from a Power BI dashboard that is in active use in the whole Motion Local Sales Unit. Another tool was an Excel file that was used to collect price level indications.

3.6.2 Current state of sales tools of two other ABB Business Areas

The next step was to analyze how sales tools were used in other ABB Sales organizations. Directors from two Business Areas, Electrification and Industrial Automation, were selected to be interviewed to get a better understanding of their tools and processes. The findings showed that there was room for improvements as well.

Sales Manager #1 told that there was change resistance in the beginning. Sales employees were used to freedom and doing things their own way. With Salesforce, there were new needs for reporting, which was not found to be motivating. At the time of the interview, the management was still getting feedback about Salesforce being mainly a reporting tool for management, and not a tool that would be helpful in the sales work.

“For many sales employees Salesforce.com is not a tool meant to help with sales work, but for management instead”. (Sales Manager, BA 1)

One reason behind this was quotation tool development in their Business Area. Due to the new quotation process with Salesforce, the time spent for each quotation was increased considerably. Orders could no longer be converted from quotations which

meant more manual work. Employees were frustrated especially in situations where a simple spare part quotation was taking a very long time to create.

CQP, the quotation tool used in Motion, was integrated to Salesforce. Each quotation was generating an Opportunity record automatically. All data was mapped to Salesforce, which means that the Opportunity record may not need any effort from the salesperson. The record was also updated automatically, which means that if a CQP quotation was converted into an order, the Opportunity status was automatically updated to Won.

This was not the case in the Business Area of Sales Manager #1. They had to create the Opportunity record separately, which meant double work. Much of the mandatory fields on the Opportunity record were seen as irrelevant for sales work.

Case object was well received in this organization. The Email2Case functionality, which generates Case records automatically from emails, was seen as the best of all Salesforce functionalities. Case Management is a part of the Salesforce Service cloud, and Field Service Lightning application was planned to be the tool for field service engineers. Currently they were not Salesforce users, which meant missing some valuable data. For example, there was some lost potential seen in keeping Contact records up to date.

While there were some demands concerning Salesforce usage and behaviors from the global organization, there were no comprehensive Salesforce guidelines or instruction manual in this Business Area. The users were trained during the rollout, and after that they have been informed about changes and improvements in the system. Any new employee would be trained by the team.

“We have multiple Salesforce.com dashboards for various purposes. Team specific, and also for larger organizational levels. Team leaders have created their own dashboards”. (Sales Manager, BA 1)

The team has some dashboards in use. There is a follow-up list available for open quotations, which are presented in Salesforce as Opportunity records. There is a specific component for quotations that are about to be closed soon. These were filtered by the Expected Award Date field.

A list of recent Visit Reports was also available. This provided an improvement idea for the Motion tool of this thesis: a component like can work as a check list for the homework received during customer visits. Another feature they were using, which was not in use in Motion, was logging phone calls with the Salesforce Log a Call functionality. This was taken in use from 2020, when sales employees could no longer meet customers face to face like before. There was no app in use for the employees have the calls logged automatically in Salesforce. This was seen as a future development opportunity. The team did also log MS Teams meeting as Visit Reports, with Visit Method field set as Virtual meeting.

Unlike in Motion, salespersons in this Business Area were not using Power BI or other such sales tools. Opportunity records provided a sufficient tool for following the development of business.

“We should use artificial intelligence more than we do today. We have various standard processes that could be automated”. (Sales Manager, BA 1)

KPI's used in this team were the team's common sales budget and number of safety observations. KPI's that could be followed from Salesforce.com were success in selected target projects, number of customer visits and order mix. An identified future challenge of KPI's was efficiency of sales activities, when salespersons were again to be able to meet customers more in person. The team has benefitted from the reduced need to drive to customer locations, and the efficiency of virtual meetings was something not to be lost later on.

Hit rate could not be used as a KPI in this team. This was due to data quality issues in Opportunity records: hit rate was to be measured by dividing the Won Opportunities by Lost ones. Many users are using Cancelled status instead of Lost, due to lesser number of mandatory fields on the record.

Salesforce data was not used regularly in team meetings. The goal in these meetings were to focus on future actions, not in the past. Discussing previous weeks' customer visits were not seen as beneficial as the ones to be done during the current week. Sales Manager #1 was not constantly following his subordinates' Opportunities and Visit Reports from Salesforce. The salespersons were expected to do this by themselves.

Sales Manager #2 also ran into change resistance from the rollout. Unlike Sales Manager #1, his organization consisted of several ABB divisions and teams. The business of each division is different, which is not always understood in higher management. Salesforce.com is seen as more suitable for project business than product sales. In project sales Opportunity object is commonly used, while the product sales is concentrating on using Visit Report and Case objects only. Case Management is seen as a very good functionality across the divisions also in this organization. They have common guidelines for Salesforce use.

“We are using Case management and incoming emails are generating new Case records automatically. This is a very good functionality”. (Sales Manager, BA 2)

The different teams of Sales Manager #2's organization have different Salesforce dashboards in use, customized for needs of each team. These dashboards are used in team meetings and in performance management. The customizability is seen as a major benefit. The teams also use Power BI and other data lake tools to follow up actual sales figures.

This organization is using three key KPI's for performance management. First, top line of sales. Second, development of prices, which is monitored by NPV (Net Price Variance) KPI. The third one is efficiency, output/input-ratio, in which costs are also considered. For these KPI's, actual sales data is needed. Unfortunately, Salesforce does not support any of these KPI's. This is seen as a future development need. Another identified future development need was the need to increase the usage of AI for automatizing repeated work processes.

3.7 Key Findings from the Current State Analysis

The purpose of the current state analysis was to investigate what tools the case organization is currently using, and to identify their strengths and weaknesses. The current Salesforce.com usage in two similar sales organizations was also investigated.

First, the current active sales Salesforce.com sales tools were investigated and analyzed. Second, one Area Sales Manager was interviewed to see what tools and how he was actually using. Two Sales Managers of other ABB Business Areas were also

interviewed to investigate the current state of the Salesforce usage in their teams. The purpose of this was to evaluate the tools and Salesforce usage of Motion BA, and to gain some development ideas for the initial proposal building.

3.7.1 Findings from Motion Sales Report Dashboard

First, the analysis showed a very low number for some record types, particularly for Visit Reports and Cases. The reason behind this was found in the background report filtering: the list of customer numbers used for this purpose was limited and left out some key customers.



Description Information	
Support Type	Pre Sales
Case Type	Sales & Marketing
Case Sub Type	Quotation

Figure 13. Classification of a Case record, used for a Quotation.

Second, background report Average time from RFQ to quotation component was not filtered by Record Type, Case type or Case Sub Type values. With these, the results could be limited to Case records only classified as specific Quotation cases. It is to be noted that using these filters would not give perfect results either, due to data quality issues: the Case Sub Type was not set to be a mandatory field, which leads to many users leaving it empty.

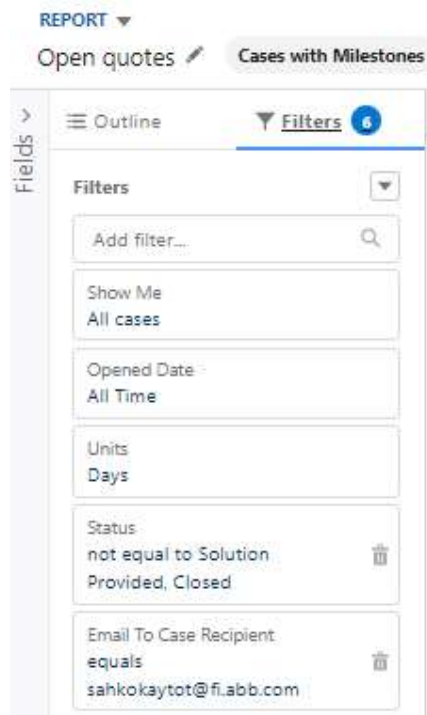


Figure 14. Some of the filters used on Open Cases in Sales Support component background report. This report is filtered also by customer id numbers, which limits the results.

Third, the Case records on the Open cases in Back End Sales were not shown by case type: these can be technical inquiries or quotations. Therefore, salespeople were not able to see the open requests for quotations which would be useful during customer visits.

Fourth, Case handling times for quotations, orders and warranties were shown as average times. While this was not showing incorrect results, it is to be questioned if the average is still the best KPI to be used for measuring the performance. In warranty handling, for example, a single case might be open for a very long time regardless of actions from ABB. This may distort the data significantly. Median would provide a more realistic idea to the customers about expected response times when contacting support functions of ABB.

While the dashboard filters were complete for OEM Sales team and Area Sales team people filters, the customer filter was limited with only seven customers available on the filter drop menu.

3.7.2 Findings from Motion Activity KPI's Dashboard.

Unlike the Motion Sales Report dashboard, this one was not filtered by key customers only, which gave much more accurate data.

First, it was to be noted that a high number of Opportunity records did not necessarily mean a high total Opportunity value. Some of the users create very simple and small quotations that require only little time, while others might concentrate on major projects that require more time and higher working skills. Choosing just one of these, number of Opportunities in particular, would not be an adequate KPI.

Second, the number of quotations was reported by using Opportunity records. There was no filtering by Opportunity stage (bidding) or if the Opportunity record is related to a quotation in the CQP tool. Therefore, also Opportunity records that never lead to quotations, were reported as quotations.

Third, Background reports of dashboard components related to Salesforce Case object were not available to users, because they were saved in a private report folder of the dashboard creator. Sometimes a limited visibility can be a good thing; however, with dashboard components such as these, it is useful to be able to drill the data further. It is useful to go to a background report and see which are the Case records that had been open for the longest time to investigate the reason for this. Managers may be able to find process pain points with this data.

3.7.3 Findings from Motion End User Demand Dashboard

In the interview with one of the Area Sales Managers, it became clear that this Dashboard is not yet known by the team. Thus, the key finding is that data presented here is not being used for the daily work.

The data is still valid and useful. It should be utilized in the future more and it would be beneficial to include data found here in the new sales tool. The top benefit would be knowing Opportunities created by users from local Motion Service unit. Salespersons did not have this information available on the other dashboards.

3.7.4 Findings from other ABB Business Areas

First, in the teams of both interviewed Sales Managers, Salesforce usage required more manual work than in Motion BA. The main reason for this was missing integration between Salesforce.com and quotation tool. The maintenance and further development of this functionality in Motion BA should therefore be highly supported. This had a major impact on the user experience and satisfaction. Salesforce was still the daily tool to report sales opportunities and customer activities such as visits and phone calls. Case management was the best liked Salesforce functionality.

Second, this team was using a dashboard component showing recent customer visits. This had proven to be a good checklist for post-meeting actions. This became a development idea for the sales management tool of this thesis. Also logging phone calls had proven to be a good tool to monitor customer activities. While this process is not mandatory in Motion BA, it may be considered, particularly if it can be automated with a mobile phone application.

Third, in the organization of interviewed Sales Manager #2, there were clear guidelines available for Salesforce usage. This, and sharing information about available Salesforce.com dashboards, was identified as a development need in Motion BA.

3.8 Strengths and Weaknesses from the Current State Analysis

In this Section, strengths and weaknesses from the current state analysis were collected and evaluated.

3.8.1 Strengths and Weaknesses of current KPI's

While plenty of KPI's were already in use in the target organization and other ABB teams, there were many Salesforce.com objects that were not used for sales management at all. In the following, the most relevant have been listed and described.

- Chatter. Salesforce.com Chatter is an internal communication tool. Some back and type activities, such as questions from customer support to sales, are handled via Chatter. Even if these is not directly customer related activities, they

will have an effect on the customer experience and are a part of the salesperson's workload.

- Contacts. There were no KPI's for new Contacts created, or the data quality of these records.
- End User Projects. Users can create relations between End User Projects and Opportunity records. These could provide a better overall view of the market but were not used on current sales management tools used by the target organization.
- Account Plans can be used for a systematic customer approach and activities. These were not presented on the dashboards of the target organization, or other ABB teams that were researched.
- Leads. Leads can be generated in Salesforce.com in many ways: manually, automatically from web inquiries and so on. Leads were not monitored at all.
- Campaigns & Marketing Cloud. Campaign object can be used for various marketing activities, such as fairs, webinars, mailing lists, mass marketing and so on. Campaigns or Contacts added to Campaigns were not presented in any of the researched sales management tools or teams.
- Pardot, Pardot Campaigns, Pardot Emails. Pardot is a marketing automation tool that is integrated with Salesforce.com. Pardot related data was not used in current sales tools.
- Channel Partners (Authorizations, Business Plans, Business Reviews, Market Scope). Customers can be given a limited access to Salesforce.com. The benefits of this would include possibility to follow open cases real time, for example how a warranty case is progressing. While related records were used in current sales management tools, Channel Partner records itself were not.
- Email Sends. Users can send emails from Salesforce.com. This is widely considered to be a best practice, because this way other users will have access to the customer communication, unlike if a salesperson sends emails from his or

her personal email. The quantity of this customer communication type was not presented on current sales management tools.

- Learning. With Salesforce's own Trailhead learning environment, learning can also be reported and presented on Salesforce dashboards. It is to be noted that the learning material offering is limited to what Salesforce offers, so for example product e-learnings are not available.
- Tasks. A Task is an activity record, which was not used as a KPI.

3.8.2 Strengths and Weaknesses of the current tools

First, the automated Salesforce Opportunity record creation from the quotation tool was identified as a major strength, making the need of manual work much less burdensome than in other investigated ABB teams.

Second, three tools were already available to sales personnel. Motion Sales Report dashboard provided good sales process data, also about the performance of support teams involved. This dashboard was available to be filtered on an individual salespersons' level.

Third, Motion Activity KPI's dashboard could be filtered down to the complete responsibility area of an individual salesperson. Fourth, Opportunities created by Local Service Unit was available on the Motion End User Demand dashboard.

The first identified weakness was that some users were not aware of all the sales tools that were already available, particularly the Motion End User Demand dashboard. Second, updated Salesforce guidelines were not available or communicated to the team. Third, modern CRM and sales management theory had not been investigated recently. This was to become the main research focus in the research of Existing Knowledge.

Some weaknesses were also identified in the current sales tools. In Motion Sales Report Dashboard, the first one was some filters in background reports. One limited the number of records given as results, another was not filtering the quotation Cases adequately. The second one was in presenting open Cases, handled by Back End Sales team: they were not shown by case type. The third one was the Case handling time which was

presented as an average, whereas median would provide a better picture of the teams' performance. Last, the customer filter of this dashboard was limited to a small number of key customers. All of these can be considered as weaknesses from both salesperson and management perspective.

Two weaknesses were found in the Motion Activity KPI's dashboard. First, all Opportunity records were reported as quotations. This does not directly serve the goal 100 % correctly. Some Opportunities are created in the early stage and not generated automatically from the quotation tool. These Opportunities may never lead to quotations and should not be presented as such. Second, the background reports were not available to users. This made it impossible for them to drill down to more detailed data. The background reports could be accessed by the Manager of the sales team, so this was a weakness only from the sales employee perspective.

The knowledge of the Motion End User Demand dashboard was also a weakness. While this dashboard was known by management, salespersons were not aware that this sales tool exists, so they were unable to gain the benefit of having access to the Opportunities created by the Local Service Unit.

The general weaknesses, not related to any specific dashboard, had a high priority. The weaknesses in the dashboards were to be considered when creating the initial proposal, but it is to be noted that the existing dashboards did provide good performance management tools for traditional KPI's used in sales management.

Table 2 below summarizes the identified strengths and weaknesses of the current sales tools.

Table 2. Identified strengths and weaknesses of the current sales tools.

	Strengths	Weaknesses
General		
	Automated Opportunity data generated from quotation tool	Users do not know of some of the existing tools
		Updated guidelines are not communicated to users
		Various existing Salesforce.com objects not used in current sales management tools: - Chatter - Contacts - End User Projects - Account Plans - Leads - Campaigns & Marketing Cloud - Pardot, Pardot Campaigns, Pardot Emails - Channel Partners related objects: Authorizations, Business Plans, Business Reviews, Market Scope - Email Sends - Learning - Tasks
		Identified need to align KPI's presented on the sales management tool with updated strategy
Motion Sales Report Dashboard		
	Good general sales data	Some filtering issues, giving too few results for some record types, such as Visit Reports
	Easy filter to individual salespersons' level	Background report Average time from RFQ to quotation component was not filtered by Record Type, Case type or Case Sub Type values
	Provides also data about support teams' performance	Case records on the Open cases in Back End Sales were not shown by case type
		Case handling times for quotations, orders and warranties were shown as average times.
		Customer filter was limited with only seven customers available on the filter drop menu.
Motion Activity KPI's Dashboard		
	Not filtered by key customers only, which gave much more accurate data than Motion Sales Report Dashboard	No filtering by Opportunity stage (bidding) or if the Opportunity record is related to a quotation in the CQP tool. Therefore, also Opportunity records that never lead to quotations, were reported as quotations.
		Background reports of dashboard components related to Salesforce Case object were not available to users
Motion End User Demand Dashboard		
	Provides information about Opportunities created by users from local Motion Service unit	Dashboard is not yet known by the team

3.9 Selected Focus Areas

The first focus area was *to select the KPI's* that were to be presented on the new sales management tool. During CSA research, several Salesforce.com objects were found not being used as KPI's. These were to be considered in the future sales management tool. Also, some KPI's from existing tools would be reused when applicable. KPI's was also identified as a topic for the research of existing knowledge.

The second focus area was *awareness of the sales tools*. During the current state analysis, it was found that sales employees did not know of all the tools that were available to them. This could be helped by developing one single sales tool, instead of multiple ones. The target was that everybody, both in sales and management roles, would take it into daily use. Also, the background reports were to be available to all users

and created so that drilling down to detail would provide useful information in a clear format.

Third focus area was to fix issues found in current sales management tools, including availability of background reports and creating filtering of the sales tool in a proper way.

The selection of focus areas created the basis of the search for relevant existing knowledge and best practice in the next section.

4 Existing Knowledge on Development of Sales Management Tools

The three focus areas selected from the current state analysis were to select relevant KPI's, increase the awareness of the sales tool and improve adaptation, and to fix certain technical issues found on the current sales tools.

It is to be noted that the existing knowledge was not expected to provide a complete set of KPI's for the development of the sales tool. During the current state analysis, it was found that there was plenty of dashboard components already available, many of which are also relevant in the future. The search for the existing knowledge was to identify potential add-ons, not to reinvent the wheel.

4.1 Selection of existing knowledge areas

The development of a sales tool, the topic of this thesis, is meant to provide a relevant tool to the managers for this process. For developing such a tool, this thesis decided to look into the following topics as the key contributing topics to the development of a sales tool.

The selected topics related to (1) strategy and strategy execution, (2) strategic targets, (3) CRM systems in general and KPI's to support performance management in a sales organization, which all contribute to the development of sales management tools. These topic areas address the selected weaknesses found in the current state analysis.

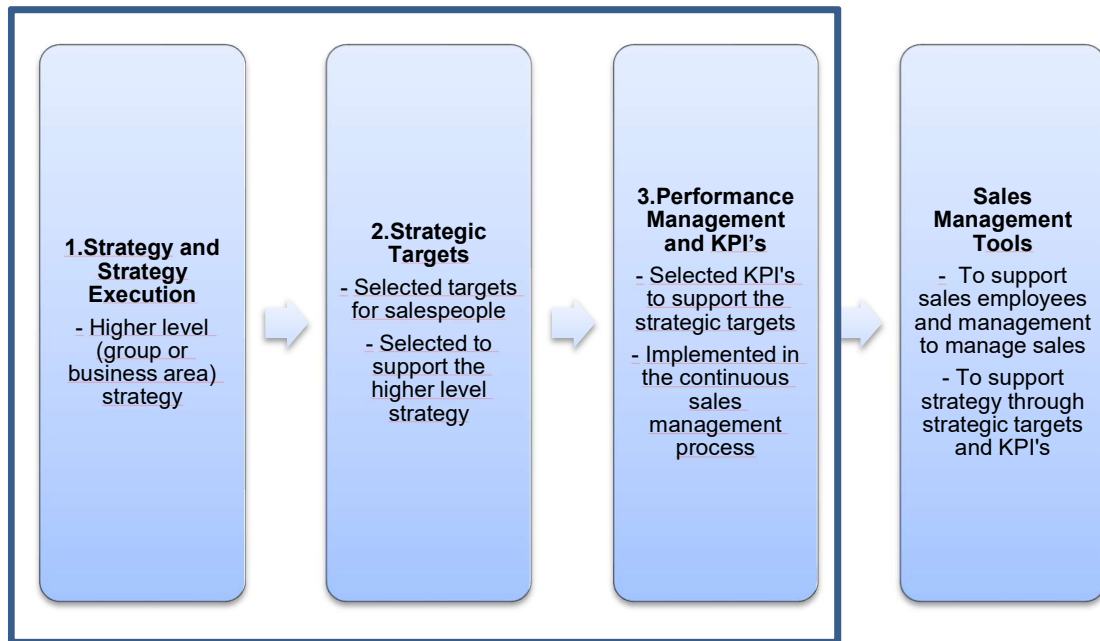


Figure 15. Selected topic areas for the development of sales management tools.

First, the daily work of the employees is directly connected to the strategy and its execution. Second, strategic targets should be so that they support the strategy. Third, performance management process must support the employees to succeed in reaching the strategic targets. Fourth, the sales management tool should support the performance management process so that both the employee and the manager will have real-time data on the status of reaching the targets – and thus working towards the strategy.

These topics will be discussed one by one below to find relevant ideas for identifying ideas relevant to developing a sales management tool.

4.2 Strategy and Strategy Execution

A strategy defines the vision and the role of the firm, and thus defines how the company is providing added value to both internal units and external partners (Santalainen 2009, 58). The purpose of the strategy is to give an answer to this question: What is the best way for us to succeed in the future, in the business we have selected to operate in? (Sutinen & Haapakorva, 2021, 37). It depends greatly on the organization what the mentioned “best way” and success means. While an investor might appreciate a profitable exit as success, a family-owned company might value continuity and risk avoidance (Sutinen & Haapakorva, 2021, 51).

Strategy itself is a tool, used for management and prioritizing on daily basis (Sutinen & Haapakorva, 2021, 41). Therefore, a good strategy supported by a powerful sales management tool can be a highly effective combination.

When thinking about strategy and sales management in a group, it is important to see the difference between the group strategy, and the strategy of the sales unit. This is where the concept of sub strategy comes in. It means a subsidiary or secondary strategy. As can be seen in Figure 16, the purpose of all sub strategies is to support the group's strategy.

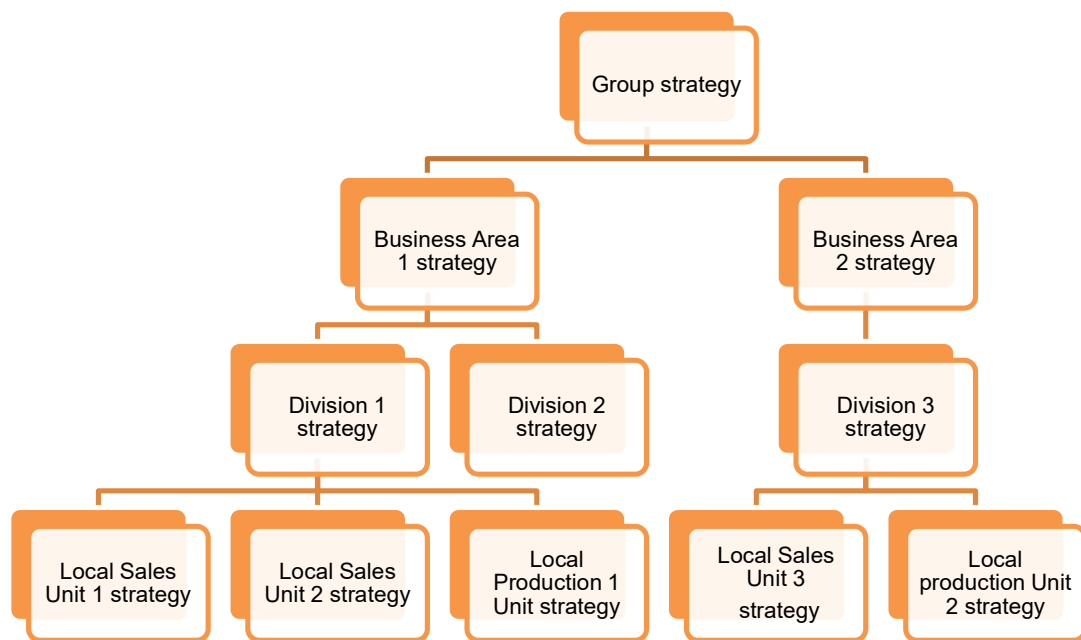


Figure 16. An example of a group strategy with multiple sub strategies.

In large corporations, the strategy hierarchy can be complicated. It not surprising that a common issue with strategies of all corporations lies in communication. About 95 % of the employees are unaware or do not understand the strategy (Kaplan & Norton, 2005).

This concerns even management: in a survey of eleven thousand top executives and managers, only half could name even one of the company's top priorities (Doerr 2017, 50). Several interviewed managing directors were unhappy with middle management's thinking and interests concerned mainly operative matters, and this could be helped if the daily work was connected more to the strategy (Sutinen & Haapakorva 2021, 21).

Another common issue with strategies is that they are not actually strategies, but instead goals such as “We want to be number one or two in our business” (Vermeulen, 2017). Unfortunately, this is quite common in sales organizations and is a trap that should be avoided when crafting a strategy. Instead of stating the goal of a market position, management should create the strategy to answer the question about how to achieve the desired position.

This leaves much to improve. Poor strategy execution seems to be the main issue, as the strategy itself may be actually very good. It has been estimated that 40 % of potential of companies' strategies is lost due to strategy execution (Mankins, 2017). Strategy execution should not be seen as only a top-down process. Employees should be enabled to create bottom-up initiatives within the strategy frame (Vermeulen, 2017). A proper sales management tool to make these initiatives visible to the management. This may prove to motivate employees to suggest more initiatives than before.

The purpose of CRM systems should also be to support the strategy – primarily the sub strategy where the system is being used, but ultimately the corporation's strategy. Before investing in a CRM system, the processes that support the strategy most should be identified, and the improvement of these processes should be targeted through CRM (Rigby & Ledingham, 2004, 1).

In a sales organization, it is easy to see that the processes of the CRM cycle presented in Figure 17, are in a key role in many strategies. One of the processes supporting superior customer experience is queue management and escalation. A sales management tool in a CRM can make the organization's performance in this regard more visible: one option is to create a dashboard component showing the response times of different queues of different processes, such as technical support, order handling and warranty handling.

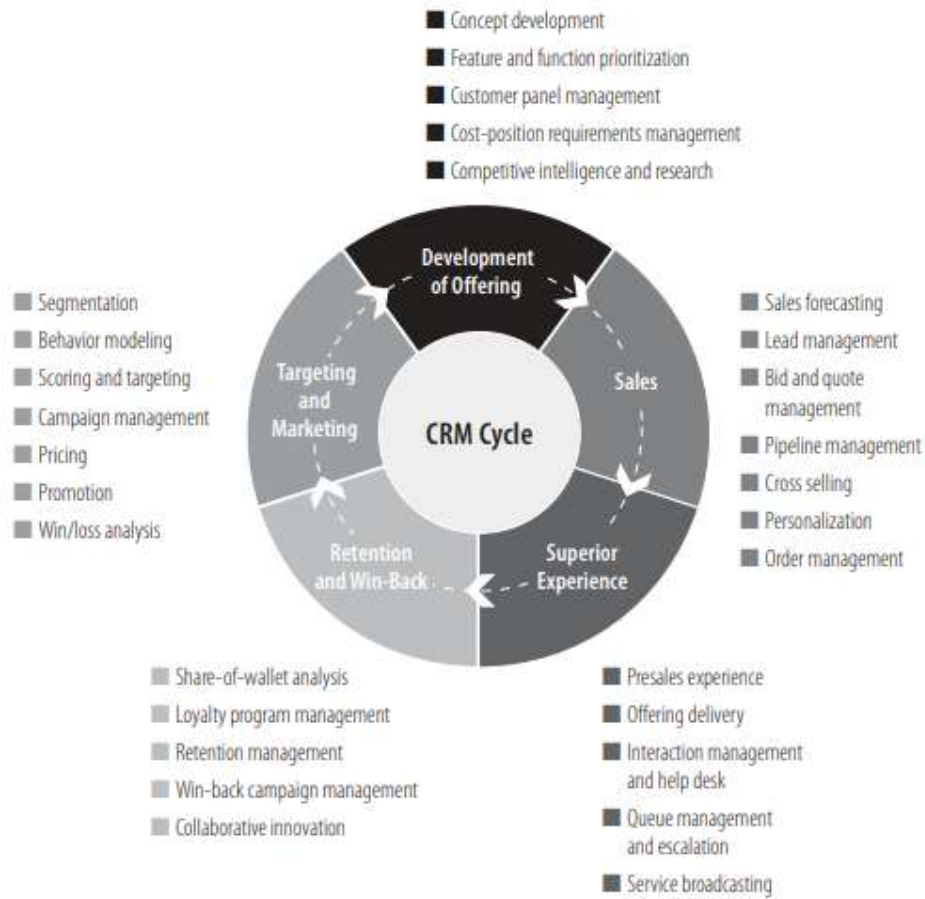


Figure 17. CRM Cycle with processes involved (Rigby & Ledingham, 2004, 5).

A CRM strategy can be defined as a game plan for how to improve the relationship between your customers and your sales, marketing and customer service teams (Polner & Bottoff, 2021). Optimizing customer lifetime value is also an aim of a CRM strategy (Gronwald 2020, 72).

There are very clear benefits to having a clear CRM strategy. These include improved collaboration and tracking of sales, better service for existing and new customers, more accurate forecasting, better identification of best sales opportunities and more customized and personalized sales campaigns (Polner & Bottoff, 2021).

With the data from a CRM, managers can also identify the major wins that their sales employees have achieved and then perhaps communicate them to the rest of organization. But the next steps are often missing, and the successful strategies is not scaled, leading to the successes not being replicated (Gross & Piccentino, 2022). All this

would be particularly effective in major corporations. These wins can be identified and analyzed on a global group level, not just within local sales organizations. Things to consider whether or not a successful sales strategy should be scaled include questions like “is the sales program aligned with the corporate strategy” and “can leaders create the right incentives to drive the adaptation” (Gross & Picentino, 2022).

As a conclusion, it is obvious that a CRM strategy is necessary. Salespeople should be motivated to look for the benefits and take good care of data quality. As some of the current tools were unknown to the employees, a proper communication plan is needed when the new sales tool is ready to use.

4.3 Strategic targets

Setting strategic targets is a significant way to help teams support the organization’s strategy better. This brings topics of the strategy closer to everyday life and gives employees concrete direction. A modern way to look at setting strategic target setting is by using OKR’s, or Objectives and Key Results. This model was introduced by Doerr in 2017. In this process, measuring begins by asking yourself “What is important in the upcoming [time interval]” (Doerr, 2017, 47).

An Objective is what to be achieved (Doerr, 2017, 7). At Google, objectives have the following qualities: they express the targets, they must be challenging but still achievable, they must be objective and they must provide clear value to the enterprise (Doerr 2017, 256). In sales organizations, superior customer experience is often mentioned in strategies, and could be selected as an Objective.

Key Results (KRs) are how the Objective is going to be met (Doerr 2017, 7). Key Results, later referred as KR, are to be measurable with numeric values. The analysis of if the Key Results should be simple: you either meet the KR or you don’t (Doerr 2017, 7). Key results should be “SMART”. This means that they should be Specific, Measurable, Achievable, Relevant and Time-bound (Sutinen & Haapakorva 2021, 189). It is also important to remember that the targets should motivate employees. This requires setting targets that are personal and immediate, and not just a mandate to maximize profit (Reichheld & Rogers 2005).

For a sales organization, examples of KR's supporting the Objective of superior customer experience could be Response time to inquiries and Average resolution time for warranty cases requiring field service. If the response time to inquiries, for example, did not meet the target, it would mean that this Key Result was not achieved.

Figure 15 below shows how aligning OKR's is a continuous process.

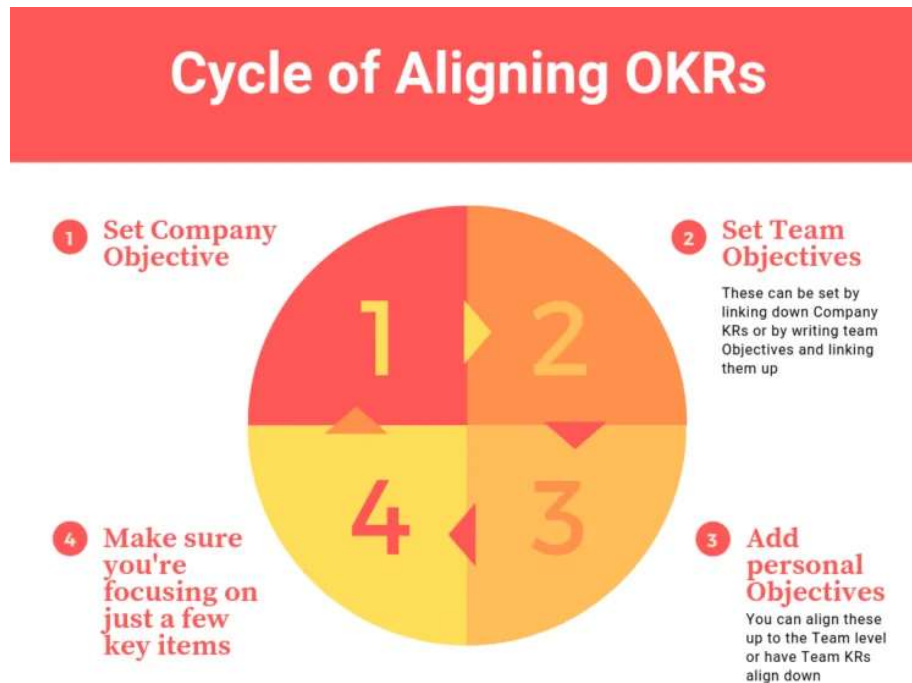


Figure 18. Cycle of Aligning OKR's (California Business Journal Editorial Staff, 2022).

In this cycle, the first phase is to define a company objective. Team level objectives are set after this. From the perspective of this thesis, this means setting objectives or strategic targets for the case organization, the area sales team. After this, objectives could be set on a personal level. These may or may not be similar for each salesperson. The final step is to ensure that the number of targets set is reasonable.

4.4 Performance Management and KPI's

Performance management is one of the most important – if not the most important – duty of a line manager. The line manager must be aware of how the work and reaching targets can be followed and directed (Mayor & Risku 2015, 162). This also applies to a sales organization. The duties – or work – the employees are doing include making phone

calls, completing account plans, making customer visits, creating quotations, coaching distributor sales reps, and the manager must enable and support his or her team in all of this (Jordan & Vazzana, 2012, 25).



Figure 19. Performance Management Process of Oklahoma City (State of Oklahoma, 2020, 1).

Performance management is a continuous process, often modelled as a cycle as in Figure 19 which shows the performance management process cycle used by the State of Oklahoma, for management of State employees.

In the Planning phase, the employee's job description is reviewed in order to ensure it reflects the job he or she is currently doing (State of Oklahoma, 2022, 2). In this phase, targets are set. Besides business and behaviour related targets, targets should also be set for the development and/or training of the employee. Target setting was explored in more detail in Section 4.3. The second stage of the process is coaching, and the third stage is reviewing. Altogether, they make a complete circle of performance management process.

Behavioural standards should also be set and communicated to the employee in the planning phase. In Figure 20, we can see what behaviours Oklahoma is using for rating employees. This relates to the PMP circle so that also behavioural target are set in the planning stage and good behavioural practices are helped during the coaching stage. Later, in the review stage, the manager will evaluate whether these targets have been met or not, and if they have been exceeded.



Figure 20. Behaviours used for rating employees by State of Oklahoma (State of Oklahoma, 2020, 9).

Many of these behaviours apply to sales organizations as well, such as customer service orientation. In the field of technical trade, problem solving is often a key to success.

In the Coaching phase of the performance management process shown in Figure 19, supervisor and the employee meet regularly to assess progress, share feedback and to see if any further support from the supervisor is needed (State of Oklahoma, 2022, 15). Feedback is concrete and specific, and in sales organizations, CRM data is very useful. For this reason, a statement “you should do more customer visits” is not a good constructive feedback. A manager should use data instead and give better feedback, such as “you have done only 5 customer visits last month, making it harder for you to reach your annual target. Is there anything I can do to help you with this?”. Both the manager and the sales employee can use a sales management tool, for example a dashboard in Salesforce.com, to see real-time data of the performance.

In the Review phase and in the performance assess meeting, the performance of the employee is reviewed, summarized and highlighted (State of Oklahoma, 2022, 19). In many companies, annual bonuses are defined at this point of the review period. The data used for this evaluation must be accurate and correct to ensure the just rewarding of the employee.

A practice of annual performance appraisals described before is commonly used for performance management in today’s corporations. However, only 6 % of HR leaders think that it is worth the time spent (Doerr 2017, 175). An alternative would be CFR,

continuous performance management with conversations, feedback and recognition (Doerr 2017, 176). Modern CRM applications that can provide line managers with more real-time data than before could support a CFR type of performance management process well.

Additionally, business practice suggests that reverse-engineering can be used when choosing metrics for a sales organization, the first level of management being activities (Jordan & Vazzana, 2012, 189). As visualized in Figure 18, the chain of events can lead to better sales objectives and business results, when sales activities are improved with better sales management.

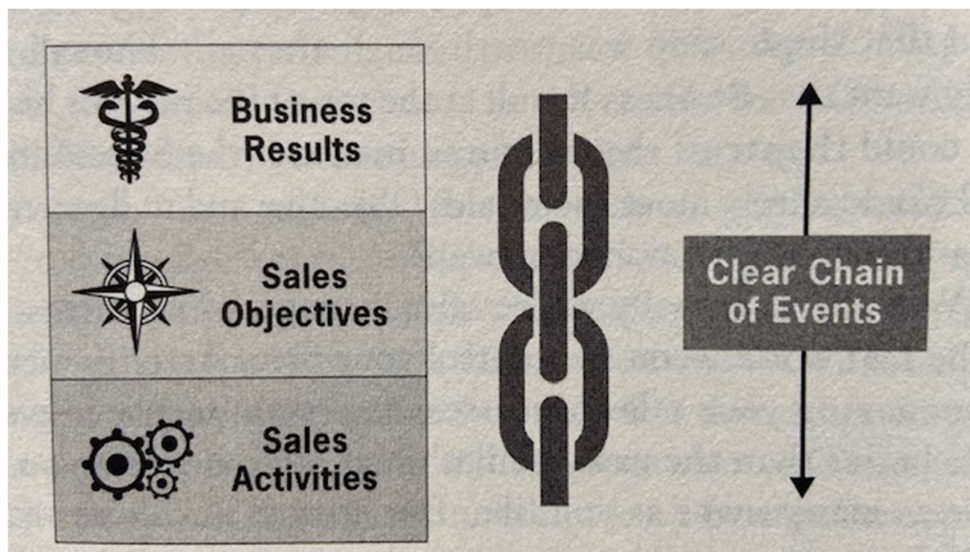


Figure 21. A-O-R metrics and chain of events (Jordan & Vazzana, 2012, 190).

KPI's can be defined as leading or lagging. A lagging KPI is an indicator that measures something that has already been done or achieved. On the other hand, a leading KPI is one that will concentrate on future results. In the OKR model the focus is in the key results which will lead to reaching the objective in the future (Doerr 2017, 7). This approach supports leading KPI's.

As business practice suggests, a common trap is still looking too much at the past, for example comparing the performance to the previous year. According to Likierman (2009), this may not be a good idea: the purpose of a performance management system is to help one to consider if a decision is helping the performance in the future (Likierman 2009). Sales targets may be linked to commissions or annual bonuses, which will further

motivate the employee to reach the targets. Chung et al. (2019) believe that the target should be aligned by market trends instead of past performance; studies show that market trends can have a 50 % higher impact on sales than marketing (Chung et al. 2019).

Finally, sales activity and account related metrics used for sales representatives also include number of calls, number of emails, meetings scheduled, Net Promoter Score (NPS) (April, 2022). Number of activities per account and number of joint meetings with customers can also be used as metrics (Jordan & Vazzana 2012, 121). Business plan metrics may also be relevant. Sample metrics are number of business plans completed and percentage of business plans in place (Jordan & Vazzana 2012, 144). Salesforce.com software supports business planning with the Account Plan object.

4.5 Development of a Sales Management Tool: Key Elements and Steps to Be Included (based on literature and best practice)

It is clear based on exploring literature that a sales tool development should be based on the key elements and steps of the sales process. Fundamental sales processes can be defined as territory management, opportunity management, account management, call management and sales force enablement (Jordan & Vazzana 2012, 104). Out of these topics, opportunity management, account management and call management were selected as focus areas for exploring in this section. However, while sales force enablement is highly important, it cannot be tracked with Salesforce.com data. This is done in a different management tool. Therefore, territory management is also not considered to be relevant as the employees are working with selected customers only.

4.5.1 CRM

Business practitioners believe that a CRM is much more than just a software used to store and analyze customer data. A true CRM will integrate corporate strategy, business practices and technology, to accomplish various goals for companies (Motiwalla & Thompson 2012, 356). During the past two decades, the world has seen a massive breakthrough of CRM systems, that can be described as a technological revolution (Jordan & Vazzana 2012, 6). Companies can now analyze customer data on many levels and present it in many ways. As shown in Figure 1 earlier, CRM market size has been still growing during the past years, making CRM's and CRM strategies even more

important to companies than before. In 2020, the market size of CRM software applications was 69 billion US dollars. Also, Figure 15 demonstrates several major CRM application vendors in today's market. Salesforce.com is the current market leader with a market share of 23,8 % in 2021.

Based on these latest perspectives, a CRM system can be considered highly effective in performance management for a sales organization. Duggan (2022) believes that, "OKRs are especially effective when generated from and implemented through CRMs like Salesforce". OKR examples mentioned most frequently include bookings revenue, pipeline creation revenue, top targets, number of meetings target, and progress in a quarterly program.

4.5.2 Opportunity Management

Business professionals believe that most sales are not completed in one customer interaction and will require several actions before the sales is completed (Jordan & Vazzana 2012, 112). A sales process such as this goes through various stages and is called Opportunity Management.

In Salesforce.com, Opportunity is an object that can be managed like other objects. An entity of Opportunities of one salesperson, team or organization is called the Opportunity Pipeline. On CRM dashboards, the Opportunity Pipeline is often presented as a funnel chart. Figure 22 shows an example of an Opportunity Pipeline component on a Salesforce.com dashboard.



Figure 22. Salesforce.com funnel chart presenting an Opportunity Pipeline.

Figure 22 shows a demonstrational example of an Opportunity Pipeline component on a Salesforce.com dashboard. The selected chart type is a funnel, and the pipeline is presented by sales stage. From this dashboard, a sales manager would notice that this pipeline is very heavy in the later stages of the sales process, particularly with Opportunity records that are in the bidding stage. Also, there are very few Opportunities in prospecting stage, so this salesperson or team would need more new sales leads to balance the pipeline.

Summing up, Opportunity related metrics used for sales representatives include number of new opportunities created, volume of new opportunities, proposals sent, deals won, deal win-loss ratio, average response time, average revenue per account, revenue by product (April 2022). Metrics related to Opportunity planning can also be set, such as number of opportunity plans completed, and adherence to opportunity planning process (Jordan & Vazzana 2012, 144).

4.5.3 Activity Management

In Salesforce, Metrics are used for quantifying and tracking the activities of the sales force. It is important to realize that while sales activities can be managed, outcomes can't (Jordan & Vazzana 2012, 25). Sales activity metrics should be linked to the sales objectives and business results metrics (Jordan & Vazzana 2012, 189). This is what this thesis aims at with identifying the most relevant elements and merging them in to the conceptual framework of this thesis.

Making sales calls, or customer visits, can be seen as the most essential task of the salesperson (Jordan & Vazzana 2012, 106). During the past years, virtual meetings have become more common, but front end sales employees are still expected to do face-to-face meetings.

The basic call management process can be defined as first planning the call, executing the call and then documenting the call (Jordan & Vazzana 2012, 108). Any tasks assigned to salesperson during the call must also be taken care of. This could be helped with a dashboard component showing recently done customer visits. Another possibility would be to use the Salesforce Tasks or the Case object.

The frequency of the sales calls may much, depending on the salesperson's job role. One sales representative might make dozens calls a day while somebody in a different sales role might only do a dozen in a year (Jordan & Vazzana 2012, 107). Therefore, a universal metric for the number of customer visits cannot be set. Figure 22 shows an example pf visualizing the number of customer visits by month.

Visit development

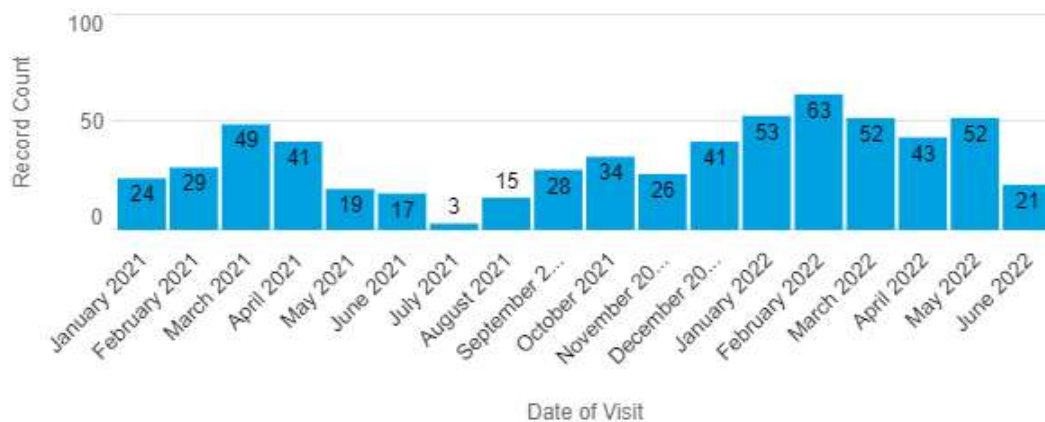


Figure 23. Salesforce.com vertical bar chart presenting number of customer visits per month.

Customer visits metric shall be set according to the job role of the salesperson. For compassion, in the area sales team of ABB Motion Finland, a target of 100 visit per year is set. This metric can be presented on a Salesforce.com dashboard as a vertical bar chart as shown in Figure 20.

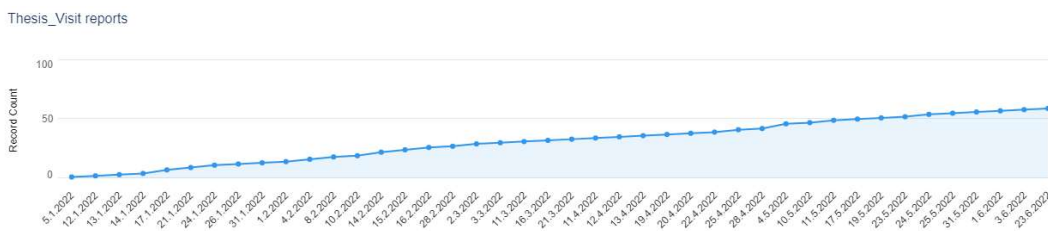


Figure 24. Salesforce.com line chart presenting visit report development.

Another dashboard component type would be a line chart. Figure 21 presents a line chart showing the dynamics of customer visits. The range is set from zero to one hundred, which is the target number of customer visits per year. A sales representative can use this component to follow if his or her visits are developing as expected.

4.5.4 Selection of the KPIs from the research of existing knowledge

Ideas for new KPI's were collected from literature research. Findings from existing knowledge were a part of all KPI's considered on the sales management tool, as there were plenty of good components discovered during the current state analysis. The complete set of selected KPI's is presented in the Proposal, Section 5. The research of existing knowledge also confirmed the validity of several of KPI's that were already being used.

Account management activities will help sales employees to align their business targets to those of the customer, and to build mutual value to both the customer and the vendor (Jordan & Vazzana 2012, 216). Business, or account plans will help this work to be more systematic. Salesforce.com software supports business planning with the Account Plan object. KPI to support planning found during the research were:

- Number of business plans completed and percentage of business plans in place (Jordan & Vazzana 2012, 144). This KPI could be presented simply as a list of open Account plans the sales person has created.
- Metrics related to Opportunity planning can also be set, such as number of opportunity plans completed, and adherence to opportunity planning process (Jordan & Vazzana 2012, 144)

As was discovered in the current state analysis, marketing automation data had not been presented in sales management tools before. Customers now interacting with vendors through multiple channels, such as websites, emails, social media platforms such as LinkedIn, ads and salespeople. This makes it difficult for companies to synchronize customer communication, and companies that are in B2B business need a change in their mindset to ensure the coordination of marketing and sales, and alignment with actual customer needs (Zoltners etc. 2018).

The amount of business data in CRM system is increasing. Because of this, analytics, including artificial intelligence, will be even more important for companies when creating a superior customer experience (Zoltners etc. 2018).

- Contacts with highest marketing automation scores. This KPI can serve multiple purposes: salespersons will

REPORT ▾
 Contacts with Pardot score ✎ Accounts with related contacts

Previewing a limited number of records. Run the report to see everything.

	Full Name	Primary Address: City	Pardot Score +	Pardot Grade
1	Xpip Bfhi	Helsinki	46	B
2	Vvc Gygalzvy	Ajjala	32	B
3	Xii sb Dxinx fh	EURA	27	-
4	vqaktliqb wkivoukeq	Oulu	6	C+
5	lyz Khdpt	RAUMA	5	-
6	Merw Tdkmhshr	Helsinki	2	C
7	bvotitohn voyuutzrl	Helsinki	2	C
8	Qyiaff Nizm	Helsinki	1	C
9	muyhklshv lukfeatrn	Helsinki	1	C
10	Wnfi Vau	Lempaala	0	-
11	Xuui Fbffdaztr	Lempaala	0	-

Figure 25. Salesforce.com report generator.

Besides marketing automation, other marketing activities were not shown on the dashboards researched during the current state analysis. KPI's to support this:

- Number of customer Contacts added to Salesforce.com Campaign records as Campaign Members.
- Open campaigns with Users (salespeople in Campaign Teams). The purpose of this KPI is to remind what Campaigns are still open to send invitations.

4.5.5 Conceptual Framework

The conceptual framework of this thesis aims to identify key elements/steps for developing the sales management tools.

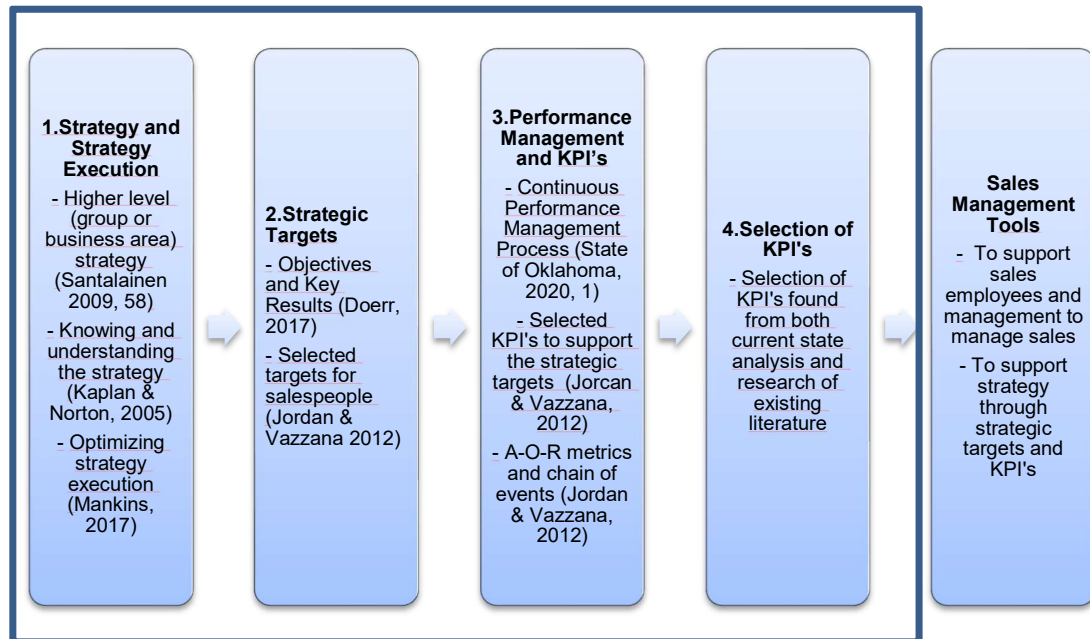


Figure 26. Conceptual framework.

As seen from Figure 26, the elements and steps to develop the sales management tools typically include (as based on literature and best practice): first, *strategy* that connects to the everyday work of the sales organization. The ideas by Santalainen (2009), Kaplan & Norton (2005) and Mankins (2017) were found especially useful in relation to *strategy and its execution* in the sales organization.

Second, *strategic targets* include the concepts of Objectives and Key Results by Doerr (2017) that were found to be a useful and new model to define strategic targets. The ideas of Jordan & Vazzana (2012) were found especially useful in relation to selecting strategic targets related to the sales management tools.

Third, KPI's for the management of the performance ensure that these strategic targets are met. The model of Performance Management Process used by State of Oklahoma and A-O-R metrics by Jordan & Vazzana (2012) were found especially useful to define the Performance Management Process and KPI's needed to support it. The ideas by Jordan & Vazzana (2012) were also found especially useful in relation to selecting the KPI's for the sales organization. The sales tool, the topic of this thesis, is to provide data to the managers for this process.

5 Building Proposal for a Sales Management Tool for ABB Oy

This section merges the results of the current state analysis and the conceptual framework towards the building of the Proposal based on internal co-creation and discussions (which make Data collection 2).

5.1 Overview of the Proposal Building Stage

The focus areas selected from CSA were to select the KPI's to be used in the sales management tool, to improve the awareness of the salespersons of the sales tools, and to fix some issues found on the existing Salesforce.com dashboards.

The KPI's were selected from two sources: first, an analysis of the current state of the sales management tools at the target organization and two other ABB sales units. The stakeholders also included one Area Sales Manager from the target team, who was interviewed and whose views were taken into account when evaluating what data would be useful the salespersons themselves.

Second, a thorough analysis of the current sales management and CRM literature was done for this thesis. The purpose was to find new KPI's that had not been used so far in sales management of the target team. It is to be noted that the purpose was not to build the new sales management tool based on these findings only. Very good KPI's and dashboard components were already found during the current state analysis.

The selected KPI's were based on the conceptual framework of this thesis. The idea was to select KPI's that will support the performance management of the team. The purpose of which is to support reaching strategic targets or key results of the team. These would support the selected strategy of both the target team and all of ABB Group in the big picture.

5.2 Findings from Data 2

In this section, key inputs from stakeholders were collected. The results were aligned with findings from Data 1 (CSA) and research of existing knowledge or conceptual framework. These results inspired the building of the initial proposal.

Much of the Data 2 results were focused on the first focus area selected during the CSA, selection of KPI's. The input from the stakeholders can be found in Table 3. Input for this focus area was also collected from literature during research of existing knowledge. All of the mentioned inputs inspired selection of the KPI's.

The second focus area, awareness of the sales tools, was covered. Third focus area, fixing some technical issues found in the CSA, was not a topic of these discussions as they could be solved otherwise.

Table 3. Key stakeholder suggestions (findings of Data 2) for Proposal building in relation to findings from the CSA (Data 1) and the Conceptual framework.

	<i>Key focus area from CSA (from Data 1)</i>	<i>Input from literature (CF)</i>	<i>Suggestions from stakeholders for the Proposal, summary (from Data 2)</i>	<i>Description of their suggestion (in detail)</i>
1	KPI's and/or components on the sales management tool to be selected	Research sales management, KPI and CRM literature. Objectives and Key Results Sales and sales management metrics	a) Homework from recent visits to be on the dashboard	A component presenting visit report records of the customer meetings the salesperson has attended. Time interval: previous 1-2 weeks
b) Visit report subjects to be presented on the dashboard			The visit report record field value Visit Report Name to be added on the dashboard component	
c) Total number of customer visits, year to date (the current performance management cycle)			A new component showing only the number of customer visits made during the current year.	
d) Open quotations should be easily accessible			Add a component showing all open opportunity records, including quotations	
e) PIE actions currently not being used			Add Account plans on the dashboard. PIE actions can be found from the these records.	

			f) Response times are valuable data for customers	Order handling case ages to be presented on the dashboard.
			g) Open cases would be useful to see quickly	Open cases to be available on the dashboard for the following case types: order handling, warranty cases and projects
2	Awareness of the sales management tool		Data in multiple places, this is requested to be fixed	Create a single tool that is up to date and contains the data salespersons and the sales manager needs
			Update legacy dashboards	Keep everything on the single dashboard and keep it updated,

As seen from table 3, several ideas for KPI's or dashboard components were suggested during Data collection round 2. This was an identified focus area in current state analysis, and input for area was also found during literary research. The awareness issue, also identified as a focus area, was also covered in Data 2.

Inputs from current state analysis, conceptual framework and data 2 were aligned and pulled together as the initial proposal.

5.3 Initial Proposal

The developed sales management tool was to meet the focus areas selected during the current state analysis.

A completely new dashboard was created, instead of revising one of the previous ones. The KPI's used on current sales tools were researched, as well as the existing knowledge on this topic. KPI's were selected only after this, and the selected ones are summarized in Table 5. This meets the first focus area selected during the CSA, research of KPI's.

Sales management components are presented on a single dashboard, instead of multiple ones like in the past. This is expected to increase the awareness of the tool

significantly which was the second focus area. The third focus area, technical issues seen in the previous sales management tools, were eliminated from this draft.

5.3.1 Element 1: Strategy and Strategy Execution

The idea is to use strategic targets based on ABB's strategy. This way, the daily work of the employees will be directly connected to the strategy and the execution. This is expected to improve the knowledge and understanding of the company's strategy, and how one's own work is meant to support it.

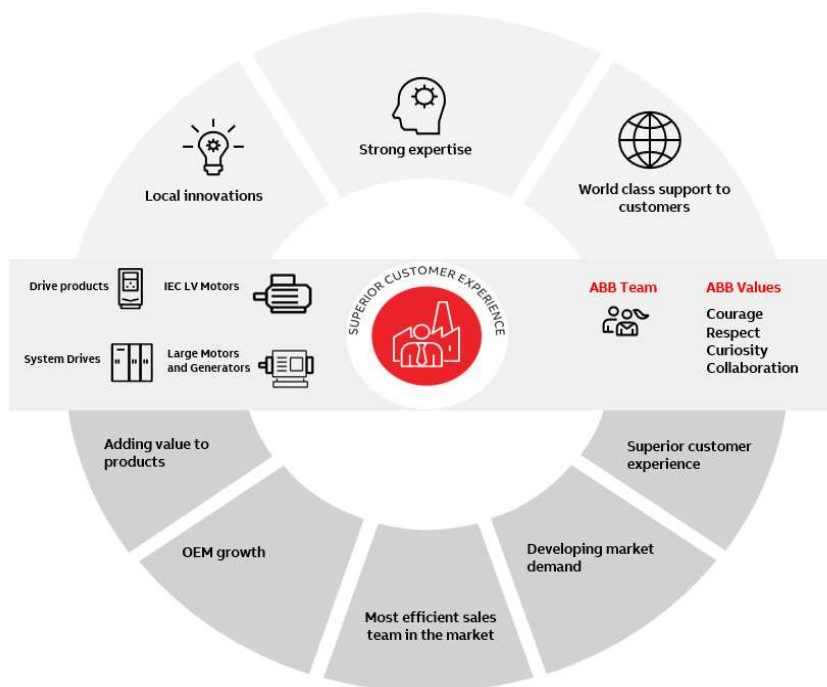


Figure 27. Strategy of ABB Motion Business Area, Finland.

The strategy of the local ABB Motion Business Area is presented in Figure 27. This strategy is also applied to the target team of this thesis. The strategy execution is the basis of the conceptual framework: the sales tool and KPI's are to support meeting the mentioned strategic targets, and this way the daily work is directly connected to the strategy execution.

5.3.2 Element 2: Strategic Targets

The vision of ABB Motion, Finland is to be the strategic partner in frequency converters and electric motors of the local industry. The strategy is based on providing a superior customer experience, with local innovations, strong expertise and world class support to customers.

Table 4. Strategic targets, behavioral and result-oriented.

Strategic targets, behavioral
Local innovation
Strong local expertise
World class support to customers
Strategic targets, result-oriented:
Adding value to products
OEM growth (out of scope)
Most efficient sales team in the market
Developing market demand: energy efficiency
Superior customer experience

Strategic targets are set to support this strategy. In Table 4, we can see examples of strategic targets used in Motion sales organization.

As seen in table 4, local innovation is a behavioral strategic target selected for the target organization. Sales employees are expected to bring unique ideas to the table, bringing added value to customers. Innovation not always means something completely new, as applying an existing solution to a new application may prove to be extremely valuable.

Strong local expertise is the second behavioral strategic target. The target team of this thesis, area sales managers are typically technically trained and very skilled experts, but not expected to have ultimate technical skills. There is a separate team for higher technical expertise.

World class support to customer is mentioned as the third behavioral strategic target. This is a separate target than the strong local expertise or technical skills, as operational excellence is also vital when ensuring the superior customer experience. Examples of

this include exceeding customer expectations in response times to inquiries, order handling and warranties.

Adding value to products is the first result-oriented strategic target. This may mean many things, for example having an excellent field service organization available. Some of the strategic targets are closely related. For example, world class support and superior operational performance are also a values on top of the products.

Developing growth in OEM customer segment is the second strategic target mentioned in Table 4. The area sales team is focusing on end customers and distributors mainly, so this is not in their scope, so no KPI's related to this were selected.

From KPI point of view, the third strategic target is very interesting: being the most effective sales team in the local market. Several sales activities have an effect on this and must be used in the performance management of the sales team.

Developing market demand also has a high focus, particularly in improving customer's energy efficiency. This can be accomplished by introducing high efficiency IE4 and Synchronous Reluctance Motors. A major opportunity may also be using VFD's in new applications: replacing a control valve with a drive can bring considerable savings and reduce of emissions.



Figure 28. A synchronous reluctance motor from ABB.

In Figure 28, we can see a synchronous reluctance motor with IE5 level energy efficiency. Presenting this product, instead of the minimum requirement from the regulations, will provide customers an opportunity to save energy and money. Webinars and other marketing activities are supporting this value creation.

Superior customer experience is the last result-oriented strategic target on Table 4. Different teams have different roles in this – for example, back end sales and solution teams play significant roles in providing world class support to customers.

It is to be noted that not all of the employees will not be involved with every one of these strategic targets, just the ones that are suitable to their actual job roles. Area sales team employees were involved with all others except for OEM growth, as they were not focusing on OEM customers. Therefore, strategic targets that are applied to performance management of a team or an individual salesperson, must meet the job role.

5.3.3 Element 3: KPIs

The results from the current state analysis provided a great number of possible KPI's and Salesforce.com dashboard components that could be reused on the tool that was being created. In addition, the search of existing knowledge provided more KPI's, and they have been collected in this part. For creating the initial proposal, the results from both the current state analysis and search for existing knowledge were considered. Some of these KPI's were presented on multiple existing tools and had several mentions in literature also, particularly customer visit and opportunity related KPI's. This was taken as a sign of importance.

As stated earlier, meeting customers can be seen as the most important task of a salesperson. The KPI's selected on a sales management tool must support these activities well. When selecting KPI's for building the initial proposal of this thesis, the measurable data had to be available on the selected system (Salesforce.com) and had to be such that it can be presented in a proper way on reports and dashboards.

Table 5. Selected KPI's with analysis.

	Dashboard component	Explanation	Own use	Weekly Management	Key Result	Improvement
Lagging KPI's	Customer visits this year	Development as a vertical bar chart by month	X		X	
	Customer visits by customer	List of most visited customers	X		X	
	Opportunity pipeline	Funnel chart of open opportunity records		X	X	
	Opportunity development	Development as a vertical bar chart by month		X		
	Contacts added to Campaigns	Invitations to webinars or other marketing activities	X	X	X	X
	Response times of customer support	Line chart of development of Case response times	X		X	
	Won Opportunities	List, in descending order by value		X	X	
	Lost Opportunities	List, in descending order by value		X		
Leading KPI's	Hot Opportunities	Opportunities closing within 30 days	X	X		
	Motion open Opportunities	All open opportunities, including Service	X			X
	New End User Projects	All Finland EUP's created within last 30 days		X		X
	Visit reports from the past 2 weeks	Homework from recent customer visits	X			X
	Account plans	Open Account plans		X	X	X
	Campaigns	Open relevant campaigns	X			X
	Interested Contacts	Contacts listed by Pardot score, in descending order	X			X
	Open warranties	All open Case records with Case Sub Type Warranties	X			X
Open orders	All open Case records with Case Sub Type Orders	X			X	
Open projects	All open Case records with Case Type Projects	X			X	

Customer visit and communication KPI's selected to be considered were:

- *Number of calls* or customer visits. Because of the importance of meeting customers, it is a common target or KR for salespersons. The way this KPI is presented in the sales management tool should present information about how the salesperson is performing, and if he or she is going to meet the set Key Result.
- *Number of emails*. Today, customer email communication often happens in a CRM system, instead of personal emails. This way information is better available to other employees, and the communication activity level can also be measured.
- *Meetings* scheduled or planning the call. This means future visits already agreed with customers. By showing how long before the visits are scheduled, this KPI shows the manager how proactively a salesperson is working.
- *Number of activities per account*. Most visits should be done to customers with most potential. Depending on the number of accounts managed by a salesperson, this KPI could for example be presented simply as a list showing

how many times accounts have been visited, or as a chart presenting the percentage of visits done to each segment. Besides segments, it is also possible to set a KPI for customer visits by channel classes, industries or other attributes found on an account record.

- *Number of joint meetings with customers.* In a sales organization, cross-functional activities may be a key result. This KPI can be tracked in Salesforce.com so it was considered as a potential sales management tool component.
- *Executing the call.* A visit report record type has fields for visit start and end times. With these fields, actual customer face time can be used as a measurable KPI.
- *Documenting the call.* This KPI measures data quality. It shows if was there an agenda for the visit; has the salesperson made notes in the minutes of meeting field, and so on.
- *Net Promoter Score (NPS).* NPS is a common KPI for measuring customer satisfaction. The survey system may be integrated with modern CRMs, and this data can also be presented on a sales management dashboard.

As found in existing knowledge and literature, *the actual sales process*, is important to monitor. In Salesforce.com, this process is being managed with Opportunity object. The KPI's related to this process found from existing knowledge, selected to be considered on the future sales management tool, include:

- *Opportunity Pipeline.* This KPI was mentioned in the literature and found on existing tools researched during the current state analysis. Figure 19 showed an example of an Opportunity pipeline presented as a funnel chart on a Salesforce.com dashboard.
- *Number of new opportunities created.* This KPI describes a trend whether not the number of opportunities is increasing or decreasing. A sales organization is typically aiming for growth, and this KPI will help predict the future.
- *Number of new opportunities created, related to end user project records.* Projects may be handled as a separate object than opportunity in today's CRM

systems. An end user project may be related to multiple opportunities from different channels, such as OEM's. Number of project records created, or new opportunities that are related to projects, may be used as a KPI.

- *Volume of new opportunities.* Unlike the number of new opportunities created, this KPI will show the monetary volume of newly created opportunities in selected currency. Another option would be to monitor expected revenue by multiplying the volume by the probability of the opportunity records.
- *Proposals sent.* This is not the same KPI as opportunities, as not every opportunity will lead to a proposal or a quotation. Like opportunities, proposals can be measured by volume or number of records. A CRM may or may not be used as a quotation tool. In organizations where it is not, external quotation records may still be linked to existing opportunities, and can be reported by using this relation as a filter.
- *Deals won.* In Salesforce.com, this would mean opportunity records that are in Won status. The time interval of won opportunities should be selected so that it is relevant for the purpose of a sales management tool. For example, showing opportunities won during the last 30 days for a monthly sales meeting dashboard.
- *Deal win-loss ratio* or the opportunity hit rate. Besides won and lost opportunities, also the hit rate can be reported on a sales management tool. This would show the effectiveness of the sales efforts.
- *Average response time.* As described in 3.8.1, Salesforce.com could calculate average response times, but not medians. To create a superior customer experience, companies try to exceed customer expectations for response times. This KPI would measure the average response time of an opportunity or quotation. A similar KPI can be used for Case records, which may be used for the following customer related activities:
 - o Technical support
 - o Order handling
 - o Other customer support

- Warranty handling
- *Average revenue per account.* This KPI may not be available from CRM but from Power BI, SAP or other systems. Business success data is still available from CRM and can be measured by average value of won opportunities for each account. As companies aim for their sales organizations to be efficient and effective, it is desirable to achieve a high average sales volume for accounts.
- *Revenue by product.* While actual revenues may not be available from CRM, Salesforce.com opportunity records contain data of products. Value of products of won opportunities may be as a KPI.

These ideas, coming from both the current state analysis and the search for existing knowledge and best practice provided new ideas for KPI's that were not found in the existing tools. When creating the sales tool, there were some data that proved to be useful to direct the work, even if they were not directly set as Key Results or KPI's. Seeing the recent customer visits was a good reminder to do the homework after the meetings for the team of Sales Manager #2, and it was also selected to be a component on the new sales management tool.

Table 6. PDA targets, behavioral and result oriented.

PDA Behavioral targets
1. Development ideas (min. 1), either for solutions team or processes (out of SFDC scope)
2. Training path in use (out of SFDC scope)
3. At least 100 customer visits per year
PDA Business targets
1. Motion LSU budget (out of SFDC scope)
2. Creating value: Cooperation with local Service, at least three joint Opportunities generated
3. OEM growth: not a target for the Area Sales team
4. Most efficient sales team in the market: Salesforce in use (Account plans, Opportunity Management), Teams planner
5. Developing market demand: energy efficiency: IE4/SynRM budget 150 k€

6. Superior customer experience: webinar invitations sent to customers > 100 pcs
7. Personal target: Own budgets

Table 6 shows the targets set on an individual level in an annual PDA discussion. All of these were considered when creating the new sales management tool. It is to be noted that some of the targets, such as training path, cannot be tracked in Salesforce.com and is out of scope of this thesis.

PDA Behavioral Target 3, the number of customer visits, can be followed in Salesforce.com by presenting the number of Visit report records where the employee has attended. Visit reports could alternatively be monitored by Visit Report Owner field, but this would not have presented all the visits the employee has attended. There may be cross-functional visits and multiple ABB persons might attend these, and all data should be on a single Visit Report record, instead of all employees creating them.

PDA Business Target 2 was cooperation with the local Service unit, with a target of at least three joint Opportunities created. Target 4, efficiency of the sales team was partly directly related to Salesforce.com data. Account plan records could also be monitored and was chosen to be in the scope of the sales management tool of this thesis.

At the time of the thesis, energy efficiency was a topic that was particularly interesting to customers due to a massive increase in electricity and energy prices. While the sales figures of energy efficient products (PDA business target 5) was not available in Salesforce.com, Opportunities related to these products could be reported and shown on a dashboard.

Sending webinar invitations was PDA business target 6. This process was managed in Salesforce.com: webinars were created as Campaign records, and after considering who would be a suitable audience from their customers, sales users would add these Contacts as Campaign Members to the webinar Campaign. A target of 100 sent invitations was set for each salesperson.

5.3.4 Element 4: A Sales Management Tool

The creation of the sales tool consisted of choosing the system where the tool was created, designing a layout and choosing how the selected KPI's would be presented.

It was found that every system had limitations. There is plenty of sales and activity data available in Salesforce.com, but there are still some limitations. Opportunity object provides data about what has been won or lost, but the actual revenues cannot be tracked from the system. This must be monitored from a different tool. However, for monitoring Pipe by the activities, such as customer visits and Opportunities, Salesforce.com was clearly the best system. That data was not at all available in Power BI, for example. The tool was chosen to be a new Salesforce.com dashboard.

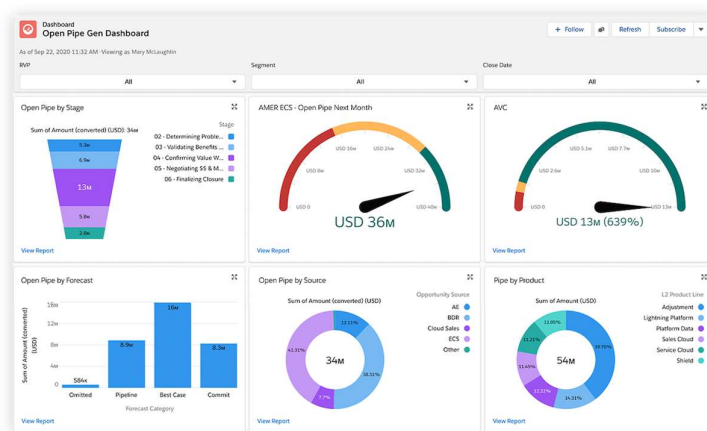


Figure 29. An example of a Salesforce.com dashboard.

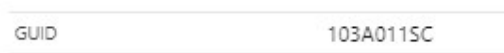
In figure 24, we can see an example of a Salesforce.com dashboard. Data can be presented in many ways on a dashboard, on this example there are components of these chart types: funnel, gauge, vertical bar and donut. A Salesforce.com dashboard could consist of 20 different components, each presenting data from a background report.

On the sample dashboard of Figure 24, components were arranged in three columns. This layout was also used for the sales management tool of this thesis. Each of the three columns had a specific purpose: one was presenting Lagging KPI's, second one Leading KPI's and the third one was presenting Quality related matters.

The sales management tool was meant to be a part of the daily work of both the Manager and the sales employees. Because of this, the dashboard could be used both on team and individual employee level. This was accomplished by adding a filter to the dashboard. When viewed unfiltered, the dashboard would show data of the whole team. When a sales employee was selected from a filter drop menu, the same data would be shown on the level of that employees' responsibility area.

Salesforce.com filters could be set by owner of a specific report type, and this method was used on some of the existing sales tools. It was not optimum for the new sales tool: as there are several Salesforce objects, or record types, presented on the dashboard, the filtering could not be accomplished with a single filter for the whole tool. For example, filtering by Opportunity owner would show all the Opportunity records owned by a specific employee, but this filter would not work for other types of records, such as Visit Reports.

It was found to be most effective to use Account data for filtering: all sales employees of the target organization have a list of customers they were responsible for. Each Account has a unique account number at ABB, called GUID. In Figure 25 below, we can see how this field is presented on a Salesforce.com Account record.



GUID	103A0115C
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Figure 30. GUID field as shown on a Salesforce.com Account record.

Data could be filtered by using this field in background reports of dashboard components, and by using multiple values simultaneously.

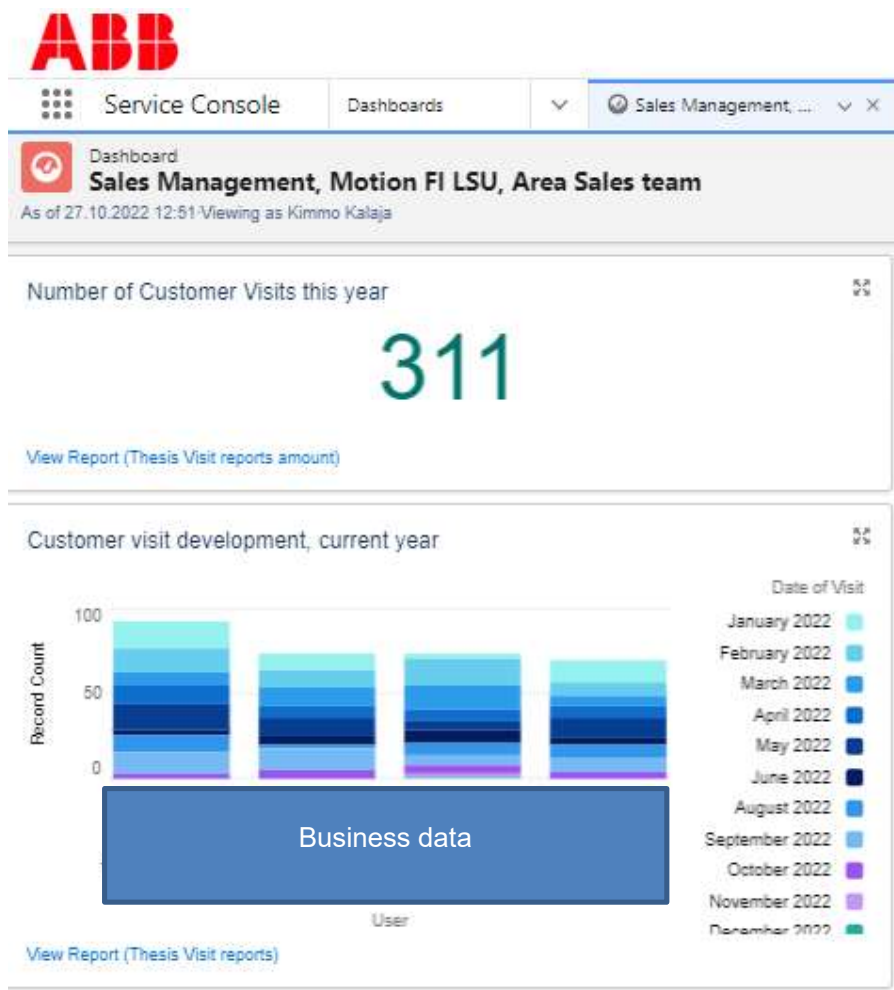


Figure 31. Components related to customer visits.

On the left column on the dashboard, lagging KPI's were presented. First, two components related to customer visits were set on the top of the column. First component was total number of customer visits, which helps the manager and the sales person to see how the person is performing. This is a common KPI set in annual performance appraisal discussions.

Second, the customer visit development was presented. When viewing the dashboard on the level of the whole team, you could see the performance of each individual. Team members are presented on the component in descending order by the total number of visits made. Team members can also view this tool on this level, so they see how they are performing when compared to their colleagues. The selected chart type, stacked vertical bar chart, allows the number of visits to be seen by calendar month.

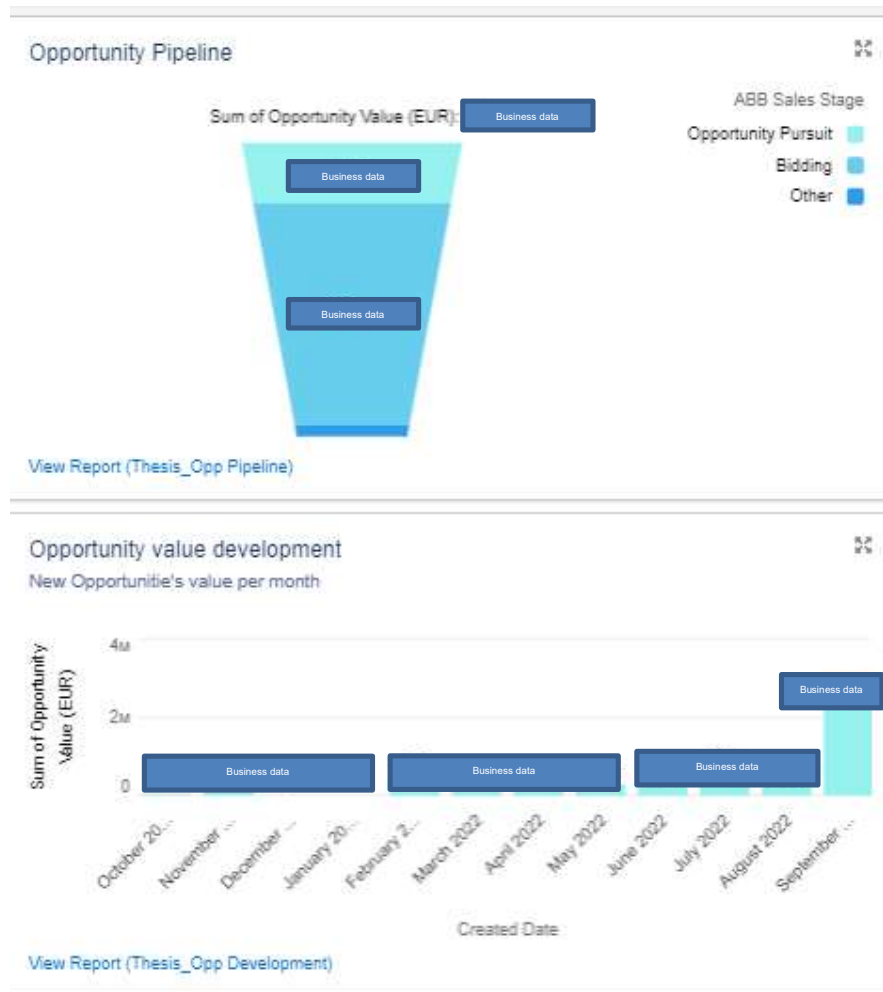


Figure 32. Components related to Opportunities.

The next two components in the left side column are Opportunity related. First, the sum of total Opportunity value as a funnel chart, presented by sales stage. The second component presents the development of the Opportunity value, or total value of new Opportunities created each month.



Figure 33. A dashboard component showing number of Contacts sales team has added to Salesforce.com Campaigns.

The next component on the left side column was marketing related. It presents the number of Contacts each salesperson has added to Campaigns records. This KPI reflects superior customer experience, which was one of the strategic targets of the team members: this functionality was used for inviting customers to webinars that were considered to be meaningful to them.



Figure 34. Development of order handling times.

On Figure 33, we can see the development of order handling times during the last 120 days. This KPI is measured by the Age of the Case order records that were handled by the customer support team. The values are now presented as median. It reflects the customer experience better than average that can be more easily distorted.

In the bottom of the left column there are two more components for Opportunity records: Won and lost Opportunities of the current year. The Opportunities are sorted in descending order by Opportunity value.

The image shows two sections of a dashboard. The top section is titled 'Won Opportunities this year' and the bottom section is 'Lost Opportunities this year - Including Cancelled Opportunities'. Both sections feature a grid layout with three large blue boxes labeled 'Customer data', 'Business data', and 'Business data'. To the right of these boxes is a table with the following columns: 'Account Customer', 'Opportunity Name', 'Opportunity Value ↓', and 'Close Month'. The 'Close Month' column contains a list of dates: 1.1.2022, 1.4.2022, 1.2.2022, 1.1.2022, 1.3.2022, 1.4.2022, and 1.3.2022. Below each section is a link to 'View Report (Thisis Won Opps)' and 'View Report (Thisis Lost Opps)' respectively.

Figure 35. Won and Lost Opportunities.

In the bottom of the left column there are two more components for Opportunity records: Won and lost Opportunities of the current year. The Opportunities are sorted in descending order by Opportunity value. We can see these two components in Figure 34.

The middle column of the dashboard presents leading KPI's. These are items that require immediate attention and actions from the salespersons.

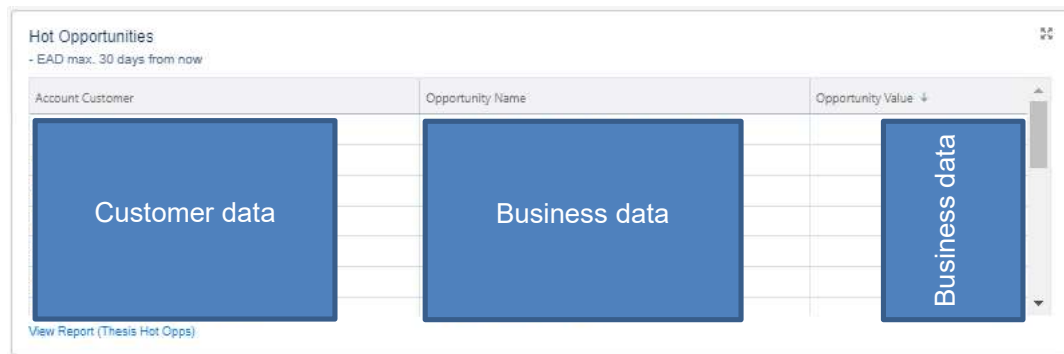


Figure 36. Salesforce.com dashboard component presenting hot Opportunities.

The first component in the middle column is called Hot Opportunities. It presents all Opportunities that have value of next 30 days in their field Expected Award Date. This means that the team is expecting the customer make a decision soon, and that the salespersons must ensure that they are on the top of the sales process of each of these Opportunities. The component is a chart, and the records are sorted in a descending order by Opportunity Value.

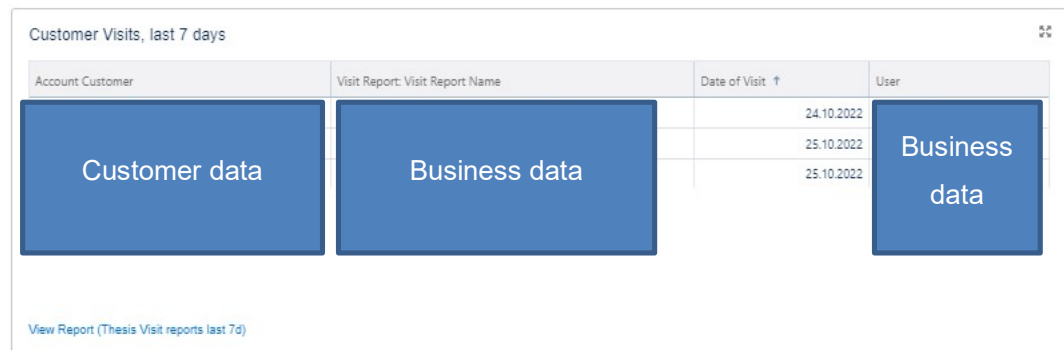


Figure 37. Customer visits, last 7 days.

In Figure 36, we can see the second component of the middle column. It presents a chart of recently made customer visits. This idea for this component was adopted from another ABB sales team. While the visit have been done in the past, this KPI still is a leading one: the purpose is to work as a reminder for any homework the salespersons have received during the visits.



Figure 38. Account/Growth Plans for the current year.

The next component presents Account/Growth Plan records owned by the team. We can see from Figure 37 that at the time of the screenshot, there were no records on the background report. This means that this functionality was not yet used by the target team and will be a future development action.

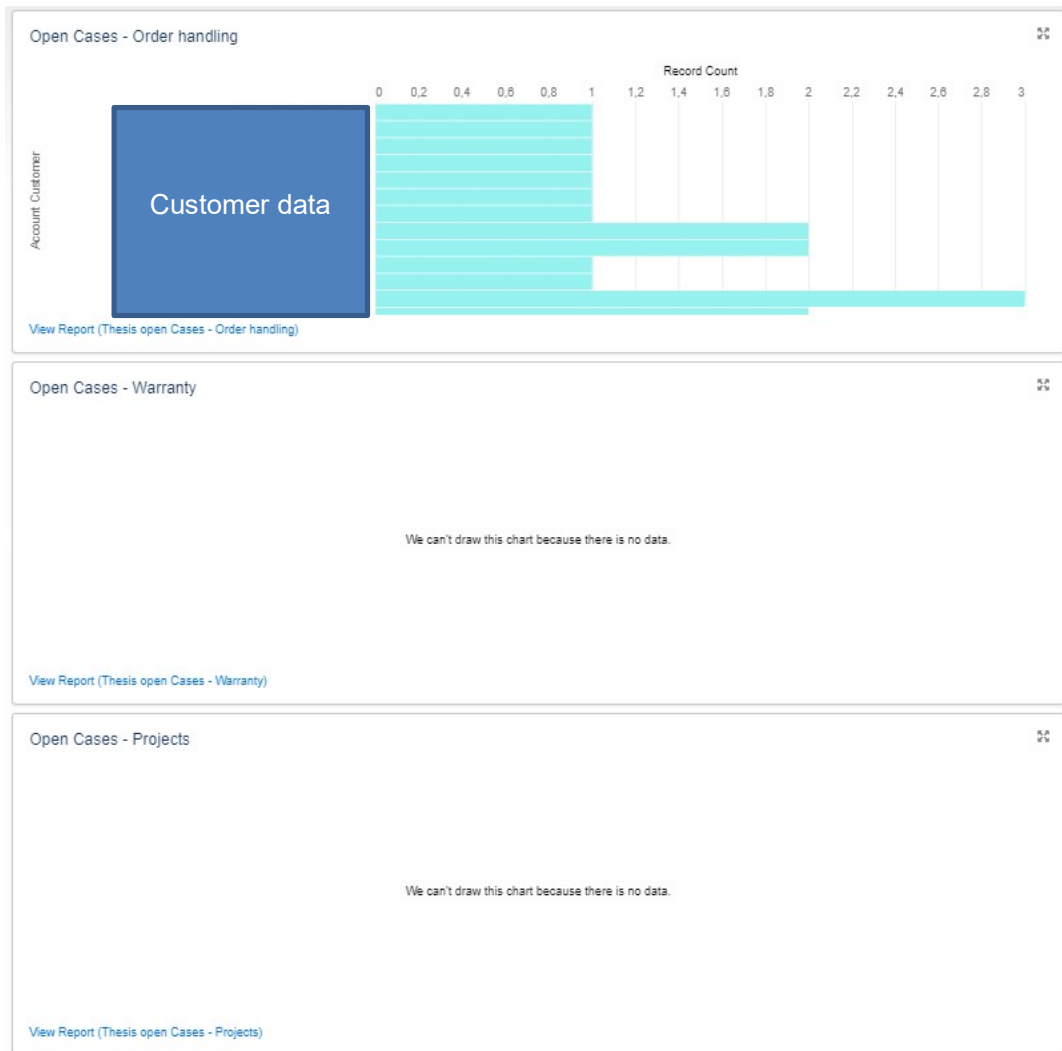


Figure 39. Components for open Cases: Orders, Warranties and Projects.

Three components for open Case records were added in the bottom of the middle column of the dashboard: one for open orders, one for warranties and one for projects. These may need immediate attention from the sales team. These components may also prove to be useful when meeting with customers, as they present real time data of work in progress in the customer support teams.



Figure 40. Open Opportunities to End Customers.

The right column presents general business data of the customers that is expected to be valuable to the target team. In Figure 39, we can see the component that is in the top of this column. It presents all open Opportunities from Motion Business Area to End Customers. From this component, salespersons can not only see their own Opportunity records, but ones created by the local Service unit as well.

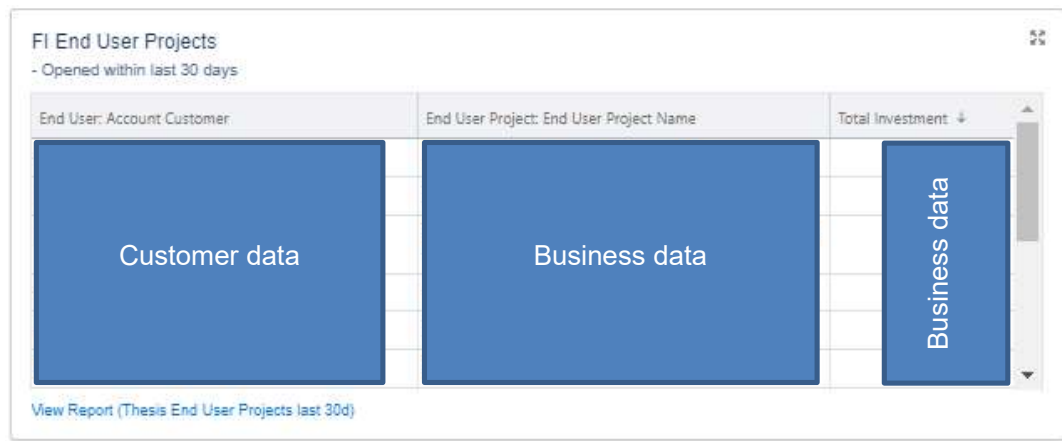


Figure 41. End User Projects opened within the last 30 days.

We can see the next component of the right column in Figure 40. It presents all Finland's End User Project records created within the last 30 days. From this list, salespersons can learn of new projects in their customers, helping them get involved in the early phase of the project.

Account Customer	First Name	Last Name	Pardot Score ↓
Customer data			1k
Customer data			1k
Customer data			986
Customer data			907
Customer data			889
Customer data			884
Customer data			765

[View Report \(Thesis Contacts w/ high Pardot score\)](#)

Figure 42. Contact records with high Marketing Automation scores.

The third component of the right column of the dashboard presents customer Contacts that have a high Pardot score. This means that the marketing automation used in Salesforce.com has identified interest from these people multiple times. This component is another one providing data the team had no access to before.

Campaign Name ↓	End Date	
Business data		28.2.2023
Business data		31.8.2023
Business data		6.9.2024
Business data		31.12.2022
Business data		31.3.2024
Business data		1.4.2024
Business data		31.12.2022

[View Report \(Thesis Active MO Campaigns\)](#)

Figure 43. New marketing Campaign records from the Motion Business Area.

We can see the last component of the right side column, and of the sales management tool dashboard, in Figure 42. It presents a list of local Campaigns of the ABB Motion Business Area in Finland, sorted in descending order by creation date. The Campaign that was created last is the most likely one the team is not yet aware of, and therefore it is presented first.

There are also filters added on the dashboard. The first one is customer visits, which will filter Visit report records by the Visit report team member. As there may be several ABB people attending a visit, filtering only by the record owner would not give 100 % accurate data.

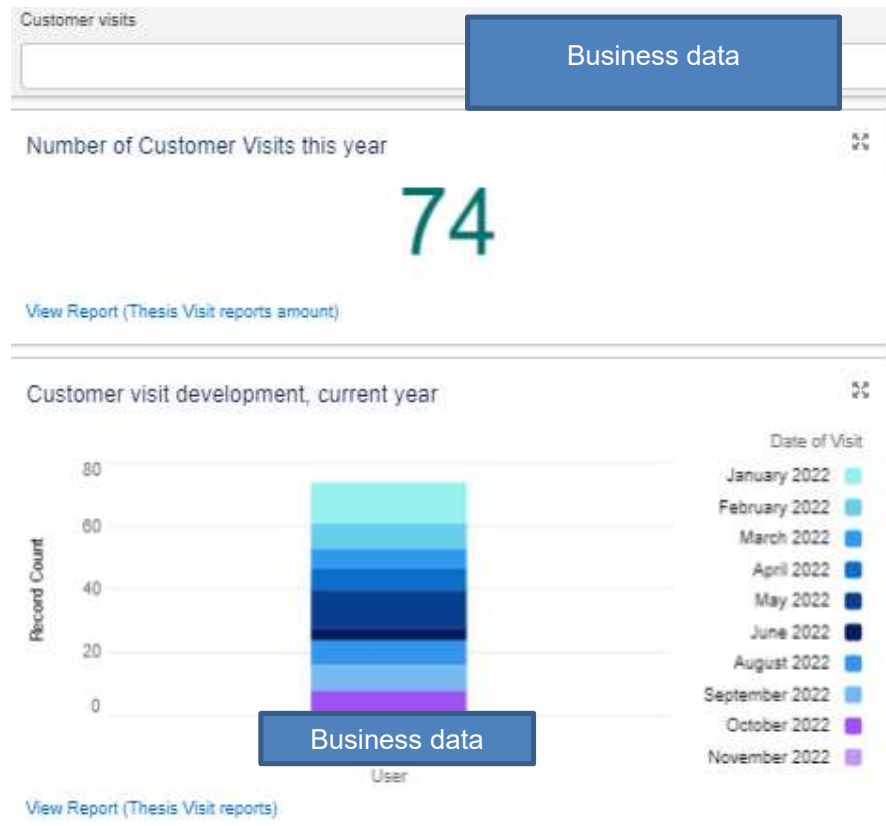


Figure 44. Filter and results on Customer Visit components.

In figure 43 we can see the first filter in action, filtering visit reports by only one Area Sales Manager. The two first components on the left columns are now showing only results from this salesperson.

5.4 Summary of the Initial Proposal

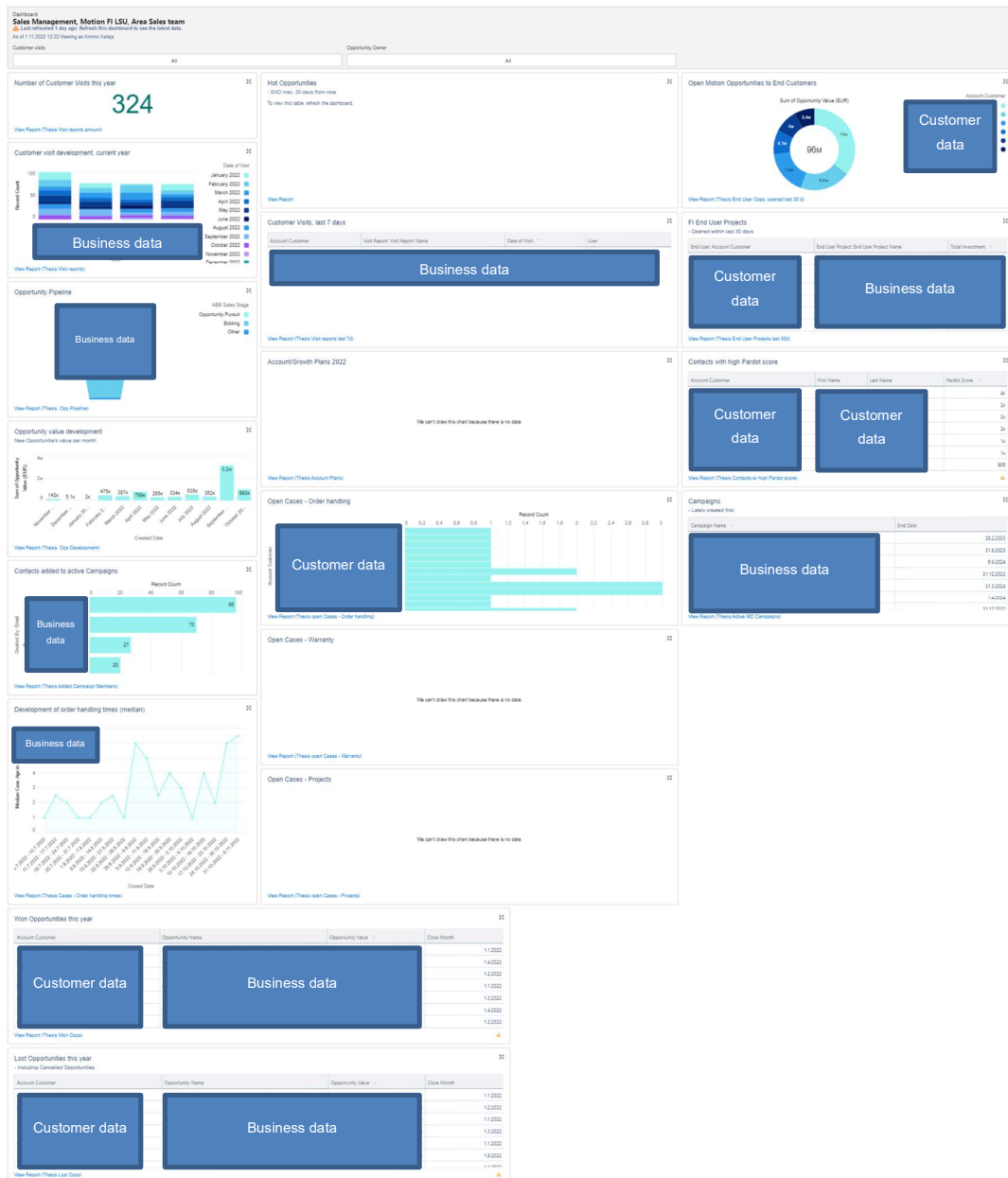


Figure 45. Initial proposal, a Salesforce.com dashboard.

In Figure 44, we can see the initial proposal for the sales management tool. It consists of 18 components described in detail in Section 5.3.4.

This proposal was presented to the ABB's Sales Director of Motion Business Area and to the Global Business Process Owner of Opportunities & Accounts. The results of the validation and suggestions is presented in Section 6.

6 Validation of the Proposal

This section reports on the results of the validation stage and points to further developments to the initial Proposal. At the end of this section, the Final proposal and an action plan are presented.

6.1 Overview of the Validation Stage

The creation of the sales management tool was described in more detail in Section 5. During the validation process it was tested to ensure it works technically. Then, validation and evaluation discussions were held with three stakeholders: first, the Sales Director who is responsible for all Motion Business Area in Finland. Second, one of the Area Sales Managers of the target organization and third, the ABB Motion's Global Process Owner of Opportunities and Accounts.

The goal of the validation process was to verify if the tool would be considered useful and to get some feedback for the final proposal. After this, development actions were taken and an action plan for future development of sales tools based on this one was created.

6.2 Developments to the Proposal based on Data Collection 3

Data Collection 3 concentrates on identifying improvements / developments that resulted from testing or proposed by the validation experts and stakeholders to the Initial proposal in Section 5.

While the tool was seen as fulfilling the objective of this thesis, it was seen by two of the stakeholders interviewed that for the use of an individual salesperson, a simplified version of the tool would be even more useful. Some recommendations for new components were collected.

Table 7. Expert suggestions (findings of Data 3) for the final proposal and action plan.

	<i>Element of the Initial proposal</i>	<i>Parts commented in Validation</i>	<i>Description of the comment/ feedback by experts (in detail)</i>	<i>Development to the Initial proposal</i>
1	The layout of the sales management tool	A good, strategic dashboard that provides a good overview of the team	The expert suggested this to be the tool of the manager of the team	To be implemented in the sales management process of the team
		May be too complex for the use of individual team members	The experts suggested to assign the responsibility for signing the contracts to those Sales reps who work with consignment contracts.	To be included in the recommendations or action plan: creation of individual level tools
		Individual responsibility data to be available	Data on the responsibility area level of one salesperson to be available for End User Projects	
		Team level data was not seen as interesting	Outside of team meetings, team level data is not necessary for others	
2	Customer Visit components	Customer visits per Account to be presented	A new component to be added: Customer visits by Account	To be added in the Action Plan for the tool meant for individual users
3	Open Motion Opportunities component	Opportunities owned by target team not needed on this component	The expert was only interested to see the open Opportunity records from Service and other units on this component. The team's own Opportunities were already presented on other components.	Eliminate the Opportunities owned by the target team from the background report of this dashboard component.
4	Customer data used for filtering	One major customer, a board mill, was excluded from the dashboard	This customer was missing from the following dashboard components: <ul style="list-style-type: none"> - Won Opportunities - Lost Opportunities - Order Handling Response Times - Hot Opportunities - Account/Business Plans - All Open Case components (Order Handling, Warranty, Project) 	Add the missing GUID number to all of the background reports of the mentioned components.

5	Open Cases in T3/T4 support	Support requests not available on the dashboard	Support request to Production Units (considered Tier 3 and 4) are handled in Salesforce.com as Case records. Open support requests were requested by an expert to be added on the dashboard.	This component was to be added on the sales management tool.
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As can be seen in Table 7, the tool was seen as fulfilling the objective of this thesis. Two of the stakeholders interviewed commented that for the use of an individual salesperson, a simplified version of the tool would be even more practical. Also some recommendations for new dashboard components were collected.

6.2.1 Developments to Element 1 of the Initial Proposal

The layout of the dashboard consisted of 18 components presenting the KPI's selected in Section 5. For team meetings managerial use the dashboard, no changes were selected to the layout.

The recommendations received showed the need of a simplified version of the dashboard. This is included in Section 6.3, Suggestions and Action Plan.

6.2.2 Developments to Element 2 of the Initial Proposal

The Sales Director suggested that the number of customer visits per account customer would be added to the dashboard. This was developed as a completely new component on the dashboard's left column, lagging KPI's.

6.2.3 Developments to Element 3 of the Initial Proposal

The Area Sales Manager suggested that all Opportunity records owned by the target team members would be excluded from the dashboard component "Open Motion Opportunities". The purpose of this component was to help salespersons see the big picture of active Opportunities, to help them consider if there were potential Opportunities that they were currently missing from their perspective.

This would change the component to present open Opportunity records from other Motion teams, particularly from the local Service unit. This development was taken into

action so that the Opportunities owned by the target team members were filtered out from the background report of the component.

The result was a more useful component, showing what customers and Opportunities other teams are currently working on.

6.2.4 Developments to Element 4 of the Initial Proposal

When testing the tool during the validation process, it was found that several major Opportunities were missing from the Won Opportunities component. The root cause was that the GUID value of the Account Customer was missing from the filters of the background report.

The same issue was found to apply to six components altogether. The background reports were fixed, and the results were now as expected.

6.2.5 Developments to Element 5 of the Initial Proposal

During the development of the initial proposal, an Area Sales Manager interviewed suggested a component for open support cases to be added on the sales management tool. This was not done at that point.

During the validation, this idea was brought out once again. The expert suggested that this component would be added. This is data not needed on team management level, but for an individual it is useful. The component was decided to be added on the final proposal. Later, if the recommended action plan was to be followed, there would be separate simplified dashboards for each salesperson to use. This component could be then cloned to those dashboards, and to be removed from the sales management tool.

6.3 Final proposal

For the final proposal, two more components were added on the Salesforce.com dashboard. First, a horizontal bar chart of most visited customers as recommended by the Sales Director interviewed during the validation. Second, Open T3/T4 Cases,

showing a list of open cases to Tier 3 and Tier 4 support from the target team. These cases are typically commercial or technical support requests.

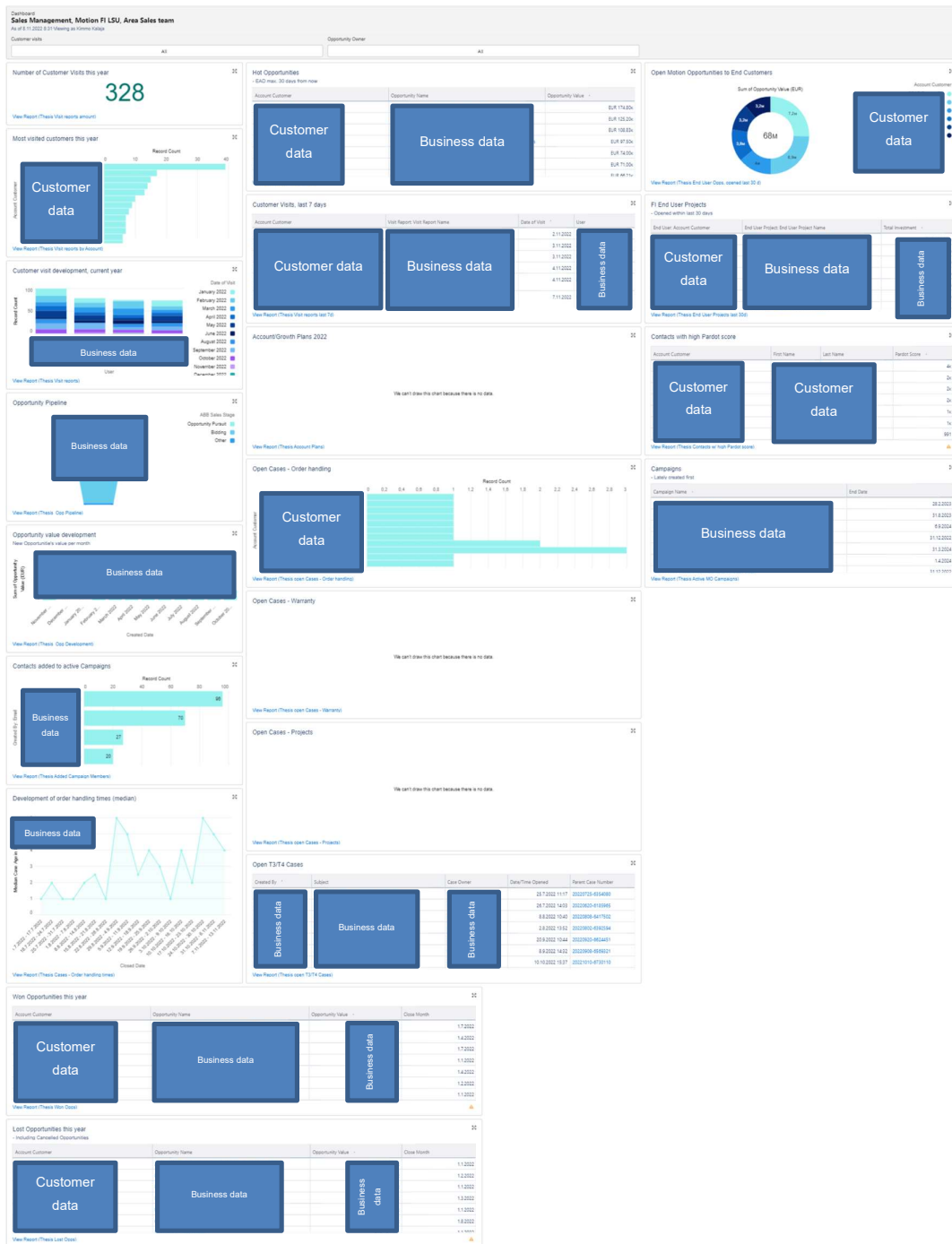


Figure 46. The final proposal.

In Figure 46, the final proposal is preset. The Most visited customers component was added in the left column among the other two customer visit related components. The

Open T3/T4 cases component was added in the middle column, under the three previous components showing open cases in different support teams.

6.4 Suggestions and Action Plan

First, it is recommended that the tool is introduced to the team and then used in team meetings. The sales management tool, the objective of this thesis, is ready to be taken into use in the management process of the target organization.

Second, simplified version of the tool is a recommended future development action. Excluding some components, such as development of customer visits and opportunities, will make the tool easier to use for individual level activities. The foundation laid in this thesis can be used for this development. Reports and dashboards can be cloned and modified for future use.

The third recommendation of systematic approach for Salesforce Account Management. There were no active Account/Business Plan records created by the target team. This should be considered in the future performance management process. As was found during the testing, some data was missing from the results presented on the dashboard. Therefore, as a part of the Salesforce Account Management, it is recommended that the Accounts/GUIDs used for filtering the reports, shall be regularly updated when needed.

Fourth, a change request for enabling dashboard filtering by a list of Account records is recommended. This would enable users to filter a common dashboard on their individual for all record types simultaneously.

7 Conclusion

This section contains a summary of the objective of this thesis, the research methods and data collection and current state analysis. Also a description of the proposal is given, with validation and business impact.

7.1 Executive Summary

The objective of this thesis was to create a sales management tool for ABB Oy. The target team was the Area Sales team of ABB's Motion Business Area, which sells electric motors and drives to the local domestic market in Finland. The purpose of the tool was to provide data for performance management of the team, but also for daily use for the Area Sales Managers of the team.

The research family of this thesis was applied, mixed field study. Data was collected in three rounds: current state analysis, initial proposal building and validation. The collection consisted of interviews of different stakeholders, and during current state analysis, also research of existing sales management tools.

The results of the current state analysis provided multiple existing KPI's, or Salesforce.com dashboard components, that were already in use in different sales teams at ABB. Multiple challenges were found, of which three were selected as focus areas for this thesis. First, the selection of KPI's to the sales management tool, which also was the basis of the literature search for existing knowledge research. Second the awareness of the sales tools and third, some technical issues found in the current tools.

The initial proposal was a newly created Salesforce.com dashboard. Most of its 18 components on it had not been used before at ABB Oy. Components were arranged in three columns, which each had a specific theme. The left column presented lagging KPI's, the middle one leading ones and the right one up-to-date business data that was considered to be important for the Area Sales Managers.

The lagging KPI's of the left column presented data of how the team or the individual had done during the performance evaluation period. Customer visit components on the dashboard were the total number of customer visits and the development of customer visits during the period. Opportunities were presented as a funnel chart, as a monthly development chart, won and lost opportunities were also listed. In this column there was also data about how many contacts each salesperson had added to Salesforce.com campaigns (which could be invitations to webinars, for example), and the development of order handling response times to customers.

The middle column of the dashboard presented leading KPI's. These were to help the team to identify items that require immediate attention. The top component of this column

was hot opportunities – opportunities to be closed soon and thus needing follow-up. The next component was recent customer visits made, which were to work as a reminder of the homework salespersons have gotten when meeting with customers. A list of Account plans was the third component and lists a lists of open case records in customer support (order handling), warranty handling and project management.

The right column presented relevant business data. The first component was open opportunities which included opportunities from other teams as well, the local service unit in particular. Second, a list of recently opened End User Project records to the customers of the team was presented. The next two components had to do with marketing: contacts with a high marketing automation score and recently opened campaigns.

The initial proposal was presented to stakeholders and feedback was collected in data collection round 3. Final improvements were adding two more components on the dashboard as recommended by the Sales Director and Area Sales Manager during the validation process. All in all the initial proposal was verified to give a proper big picture for sales management. It was suggested that a simplified version would be created for the use of the salespersons of the team.

The tool presented as the final proposal will be implemented in the management of the sales team. It will provide an improved overview of the activities of the target organization with elements such as marketing automation and campaigns, that have not been used this way before.

7.2 Thesis Evaluation

The objective of this thesis was creation of a performance management tool, aimed for sales management of the Area Sales team at ABB Oy. The outcome was a newly created dashboard in Salesforce.com, which was accepted as a proper tool for managing the performance of the target team.

The Gate model was followed for this thesis. It proved to be a valuable backbone that gave the work structure and was an excellent fit for the topic of this thesis. With hindsight, the literature research could be done more efficiently. It should have been started and finished earlier in the process. The selected literature proved to be good reference

material, but it would have been interesting to take a step one level deeper and research the sources referred in the selected literature.

The selection of KPI's worked well. Ideas for components were found from both current tools and from fields, such as marketing automation, that had not been used in the target organization.

There was one thing that was left missing from the sales management tool: filtering a dashboard by GUID numbers, the account identification reference used by ABB. An information request was created for the global support team, and this field was verified to be not available as a dashboard filter. The positive side was that this result was provided for one of ABB's Global Process Owners and could prove to be a valuable development later. Still, this missing filtering value could have been discovered earlier in the process.

The recommendations and the action plan should provide proper next steps for making a simplified version of the tool of this thesis. The tool itself was immediately taken into real-life use for managing the performance of the target team.

7.3 Closing Words

Management by data, analytics, CRM systems and marketing automation were acute topics at the time of this thesis. This study shows important KPI's used for managing a sales team and applies them to today's most popular CRM system as a dashboard, a visual display of metrics.

Salesforce.com data and a dashboard may be used on different levels: for self-managing of a single salesperson or for team or higher organization levels. A single tool may prove to be useful for both purposes. The different possibilities currently available were considered during the study.

The results proved to have wider interest than just in the target organization. Interest in data-driven decision making is on the increase, and this thesis answers some of the questions raised in this field. Currently, Salesforce is being combined with other data in Power BI. During the validation, ideas from this thesis were picked up by the Global organization, and they will be implemented in future Power BI dashboards.

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