Making Salesforce Smart – Research on the development of CRM application in a manufacturing company on sales point of view

Toni Malinen

Haaga-Helia University of Applied Sciences
Degree Programme in Leading Business Transformation
Specialization
Digital Business Opportunities
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Abstract

Author(s) Toni Malinen
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This research concerns manufacturing company's current use of Customer Relationship Management (CRM) application and the process of identifying the biggest areas of improvements in there.

The company uses Salesforce's Sales Cloud and Service Cloud as their CRM application. The primary objective of this research was to collect feedback from the sales users about the current challenges with the use of Salesforce CRM. This feedback was used to identify the biggest issues and to plan concrete action points for fixing those. Research questions were "What improvements should be done in Salesforce?," "What decisions could be better supported by Salesforce?" and "How to get sales more engaged with the use of Salesforce?".

We applied participatory design methods to collect feedback from the end users. The aim was that the results of the research could be used to build the near future roadmap for the CRM development. Some of the collected findings in this research can also be used as a base for building the vision and strategy around the company's CRM.

Keywords
Customer Relationship Management, CRM, Salesforce, sales, leads, opportunities, pipeline, funnel.

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Abbreviations

Abbreviation	Explanation
AI	Artificial Intelligence
ASM	Area Sales Manager
BI	Business Intelligence
CRM	Customer Relationship management
ECI	Exceptional Customer Inquiry
UI	User Interface
UX	User Experience
KPI	Key Performance Indicator
MDM	Master Data Management
RSM	Regional Sales Manager
TDM	Technical Development Manager

1 Introduction

This study concerns the process of improving a Customer Relationship Management (CRM) application of a global manufacturing company to better support the company's sales processes and making the use of it to be easier for sales users. In other words, the goal of this study is to make an overall review to be able to identify the issues and challenges with the current CRM implementation and find the biggest areas of improvements to make the user experience for sales as good as possible. We have been calling this holistic approach of developing Salesforce as "making Salesforce smart."

1.1 Customer relationship management and sales processes

The company uses Salesforce's Sales Cloud and Service Cloud as their CRM application. Sales Cloud is used in the company especially for account and contacts management, lead and opportunity management and logging customer interactions. Technical development managers are using Service Cloud to manage technical support requests that they receive from web site. Salesforce is integrated with marketing automation system (Eloqua), which sends the leads coming from web to Salesforce. Regarding lead and case management, the responsibilities between sales, marketing and technical support users are described in more detail in this document in section: *3.2 Lead and lead conversion process*.

Majority of the company's' products are sold directly and are manufactured according to company's general product standards. The offers can concern project business, stock sales or customer inquiries that are handled by case at mill or in technical support.

Typically, the standard opportunity process contains at least the following four main stages:

- Evaluation
- Offer preparing
- Negotiation
- Closed won / Closed Lost

The evaluation stage contains deciding what to offer, the scope of the delivery and whether it is profitable to make the offer. The offer can sometimes for instance include trial delivery or a project. In this stage it is also important to ensure that the company can produce the product required, and this may sometimes include approval process.

In the offer preparing stage it needs to be ensured that there is available capacity or material in stock. The price and commercial terms are also being defined in more detail. This stage is closed when the actual offer is sent to a customer or prospect.

The negotiation stage includes price negotiation, follow-up(s) and if required, re-definitions or adjustments of the conditions. The output of the negotiation stage can either be closed won or closed lost opportunity.

In some cases, the customers may demand customer specific products. That is when Exceptional Customer Inquiry (ECI) processes are followed. ECI is required to evaluate feasibility of manufacturing and to generate customer specific process instructions and external documentation (all items that deviate from product standards). The inquiries are processed in Salesforce, and the processes can differ a bit depending on the product category but the close cooperation with the TDMs is something that is common for all the ECI inquiries.

Divisions can also use customized strategic selling and account planning tools that are built-in Salesforce when implement the area sales strategy. The planning can contain for instance setting up annual and quarterly targets for customer specific and product specific sales and monitoring the progress in Salesforce. A renewal for these strategic planning tools is currently in progress two divisions of the company.

1.2 Organization

The company has several thousand employees in over fifty countries. The company is structured across three divisions and two subsidiaries.

The CRM development is managed by CRM team that works in the company’s Digital Applications team. The team is responsible of the Salesforce development and change management including technical configuration and customizations.

The CRM team works in close collaboration with the CRM Core Team which consists of seven sales and marketing professionals. This group represent the business in all projects within the CRM landscape and hence it can also be seen as a steering group in this study.

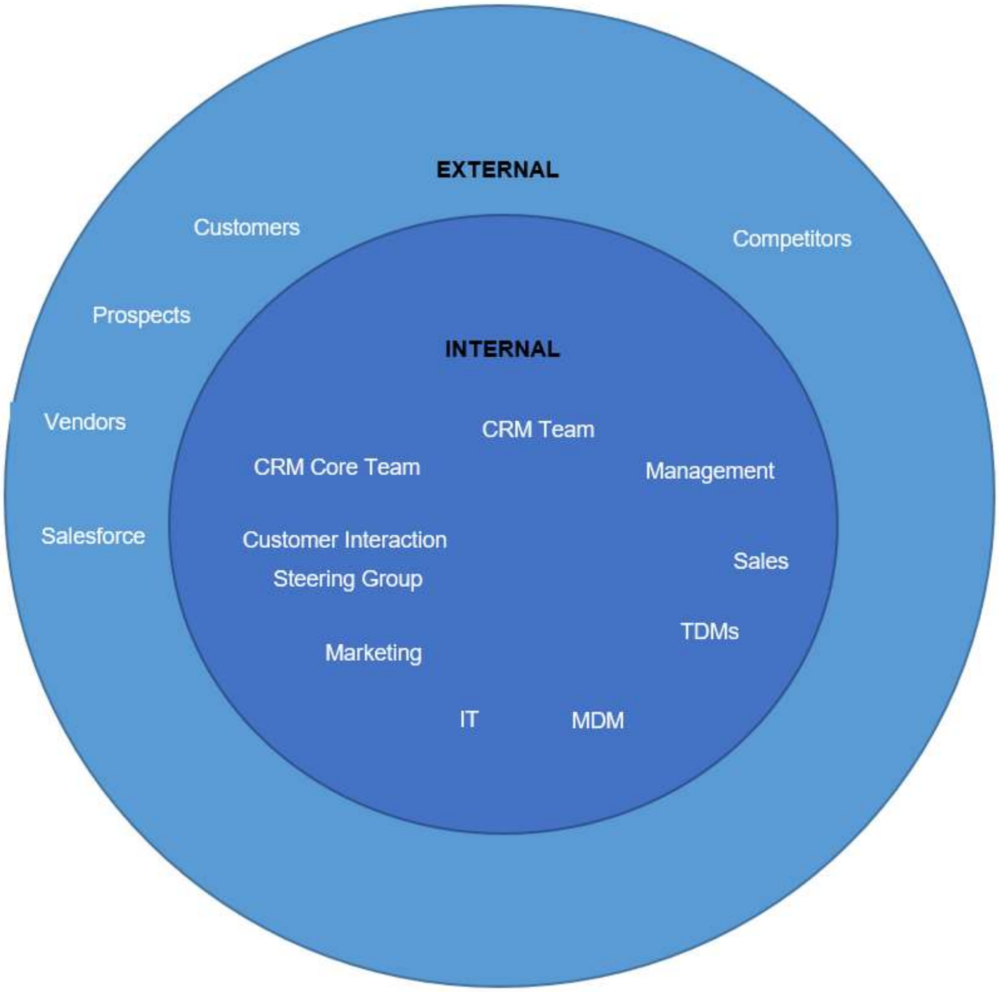

Chart 1: Stakeholder map

1.3 Sales roles

Region specific Sales Directors manage the company's sales. In the organizational hierarchy there are three main sales user roles configured in Salesforce under them: Area Sales Managers (ASM), Regional Sales Managers (RSM) and Technical Development Managers (TDM).

Area Sales Managers are working in a supervisor role being responsible of the sales inside their own business areas. Business Area is a wide geographical area, and in practice it can include for instance the whole Central and East Europe area. ASMs are actively finding and creating new customer relationships, developing existing ones and being in connection with the stakeholders. ASMs report to their Sales Director inside their Business Areas.

Regional Sales Managers report to the Area Sales Managers. Their work tasks contain for instance negotiations with the customers and prospects including product prices and delivery terms. They contribute to the strategy development in the Sales Area and implement the strategy both independently and in teams to reach short- and medium-term strategic goals. RSMs also participate in developing strategic goals for the Sales Area together with the ASM and TDM.

Technical Development Managers support customers in their intensions of upgrading to special products and to other strategic products for instance by sharing their knowledge with the client regarding product design, production, and quality. They develop sales through technical support and provide technical support to the Regional Sales Managers. In addition, they also implement the area sales strategy together with the Area Sales Manager.

1.4 Objectives of this study

The company implements a customer-centric approach, which typically means an enterprise-wide way of business management that puts customers and the customer experience first. The focus in customer-centricity is on developing strong and positive relationships with customers in the sales management process (Salesbabu, 2022). The reason the scope of this study concerns more developing the sales processes than the full customer-centric approach is that there was just recently another study where the focus was more on the marketing and lead processes, but the sales processes were not so specifically reviewed at that point. CRM team has also identified that the sales users (ASMs, RSMs and TDMs) are not completely utilizing all the capabilities in Salesforce so there is a need to find out how the CRM team could support them with the more efficient use of CRM application.

In addition, it has been noticed that the company’s Salesforce data contains only a limited number of the company’s actual sales opportunities. One of the main reasons for this is that some of the offers are currently made, e.g., for tax reasons, in the separate ERP systems of different countries, from which they may never be created as opportunities in Salesforce (*the opportunity process is described in more detail in section 3.3: Opportunity process*). There can be other reasons as well, for example, the fact that sales users only registers sales opportunities which they know that have already been won. If the quality of the opportunity data can be improved to be more truthful than it is now, the company's management would better be able to use reporting as a support for their forecasting and decision-making. In addition to better forecasting, reliable opportunity data would also enable for instance utilizing artificial intelligence (AI), where AI could predict the probability of winning the opportunity and ideally also give recommendations of actions that would improve the opportunity's winning percentage.

The primary objective of this research was to collect feedback from the sales users about the current challenges with the use of Salesforce CRM. This feedback is used to identify the biggest areas of improvements and to plan concrete action points for fixing issues.

To be able to succeed in the task of also getting sales management committed to the use of Salesforce, it is important to be able to understand what decisions the sales organization is making and if the development team could support that with Salesforce data. This was the second objective of the study.

In addition to the two earlier mentioned objectives, the third objective was to find out how to get sales more engaged with the use of Salesforce. The company’s CRM core team has agreed that getting the sales management’s commitment for the use of CRM would be the highest priority in terms of CRM development roadmap in short term. Currently Salesforce and Salesforce data are not used for decision making now, and if sales management is not requesting users to register data to the system, then Salesforce cannot be used to drive business either.

2 Development task (research questions)

To achieve the objectives of the thesis there were three main questions which needed to be answered in this study. The questions related to the study subject are listed below and they are intended to structure the objectives of the work in more detail.

Q1: What improvements should be done in Salesforce?

Q2: What decisions could be better supported by Salesforce?

Q3: How to get sales more engaged with the use of Salesforce?

We hope that the results from this study could help us with the planning of roadmap for Salesforce development.

3 Theoretical framework

This section describes the theoretical framework of the study. It includes the definitions of the key concepts and explanations of the main processes in terms of the common use of CRM.

3.1 CRM

Helgeson (2017) writes that “relationships represent the lifeblood of any organization, even those that don’t outright sell products or services”, and that the better the organization can understand and learn from those relationships, the more valuable and efficient the organization is.

CRM stands for Customer Relationship Management, which by Adrian Payne (2005) is “a business approach that seeks to create, develop and enhance relationships with carefully targeted customers in order to improve customer value and corporate profitability and thereby maximize shareholder value”. According to another definition made by Kotler & Armstrong (2014) CRM can be seen as "the overall process of building and maintaining profitable customer relationships by delivering superior customer value and satisfaction”. Parvatiyar and Seth (2000) describe that the companies that pursue a CRM approach focus on customer retention rather than on single sales.

Customers are a key factor that keeps an organization operating effectively (Kim, M. & al. 2012). That is why Kim M & al. (2012) consider that the customer can be seen as a major factor for successful CRM implementation: if there is an incompatibility between customer relationship management activities and customer attitudes that can lead to inefficient use of marketing resources and customer disaffection, their study shows.

Helgeson (2017) creates a difference between traditional CRMs and modern CRMs that he calls with the definition of “Complete CRM”:

> “Traditional CRM is rooted in cataloguing notes that salespeople made when they called their leads. Leads became contacts only after they bought something. These methods quickly became cumbersome and outdated when compared with the modern online, customizable, and mobile solutions available today.”

Helgeson (2017) also defines, that modern CRM s, which are built for today’s business word, require a combination of strategy, practice, and software that brings together everything you know about a lead or client into a single resource. It should also help you to understand what happens in the sales process, record how people engage with marketing efforts and track other interactions with the operations.

In this case the manufacturing company believes that sales excellence is based on a combination of successful factors such as how the sales is done, how the customer relationship management is implemented and how well the company understands its customers and their business. Being successful requires having the right information in CRM so that the information is available for all employees inside the organization through the CRM application.

Chart 2: Instead of working in silos the company wants to go to a connected flow where CRM plays a key role.

In this study we call all Salesforce users who have either sales or sales management profile in Salesforce as sales users. In Salesforce, the database tables are called objects and database table columns are called fields. One record describes a particular occurrence of an object, like one contact person that is represented by contact object. The profiles in Salesforce define what objects and fields the user has access in Salesforce. Therefore, sales users usually have access to sales related objects like accounts, contacts, leads and opportunities.

Sales processes in CRMs are typically built upon sales funnel, because usually the involved persons go through a standardized process from stage to stage. When a potential customer (prospect) moves through the process of buying something from the company, you can place them into various stages along their journey. Often these stages can be for instance called as “lead,” “qualified lead,” “offer,” “negotiations,” and hopefully at the end a sales opportunity can be closed as won when the prospect becomes an actual customer.

Conversion, according to Helgeson (2017), happens when someone does something of value for you. It can be a customer buying a product or a service, but it can also mean other actions that do not involve a transaction, like downloading an eBook for instance. Conversions can have multiple stages and are often depicted as a funnel or pipeline (Helgeson, 2017).

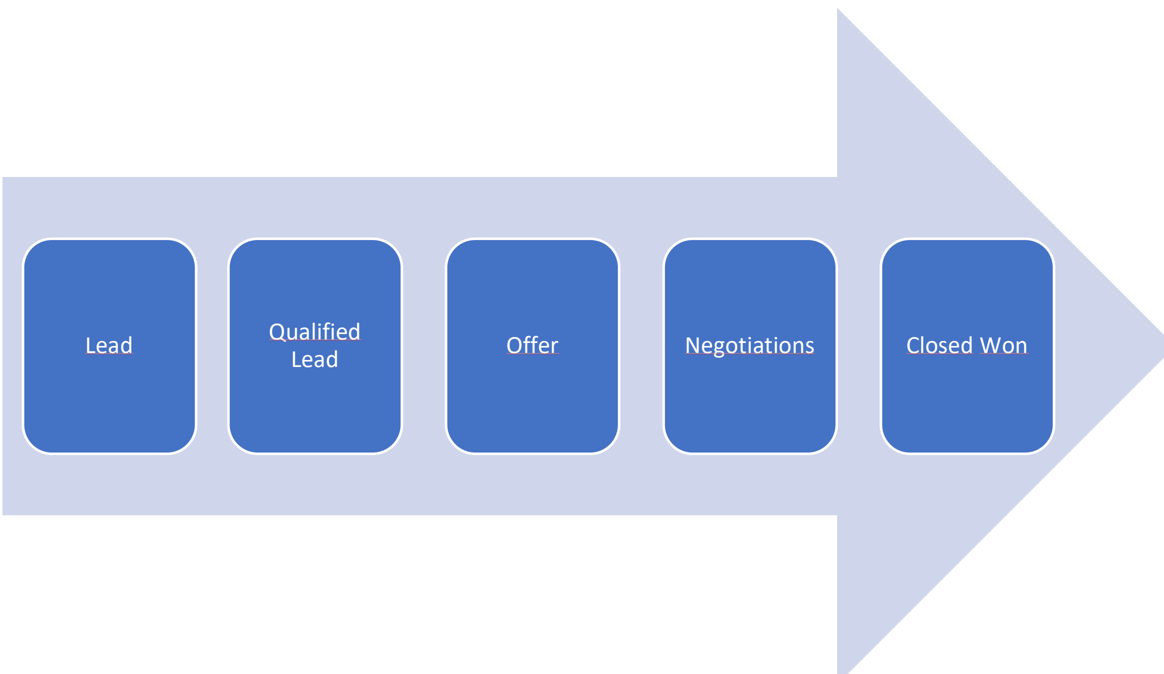

Chart 3: Example of buying process with various stages.

Record types in Salesforce are used to group many records of one type for that object. Record types allow grouping many records of one type for that object. The benefit of having different record types is that it allows having different layouts or different fields visible for several types of records. There can be for instance several types of layouts for customer accounts and prospect accounts.

Sharp (2002) lists multiple benefits because companies that influence in the manufacturing industry should use CRM technologies in their day-to-day operations. These benefits include:

- Better analysis of supplier quality

- Better analysis of raw material costs to determine alternative sourcing strategies
- Better product forecasting
- Easier product recalls
- Distribution logistics including more creative placement of inventory, better forecasts, and reduced shipping time which can lead to significant savings in inventory costs
- Customer satisfaction improvement
- Easier product refinement
- More effective promotion of events

Salesforce, which the manufacturing company in this research is using, is one of the widely used CRM applications today (Chitalkar, 2018). The company uses Salesforce mostly for the following purposes:

- Managing accounts and contacts
- Managing sales activities
- Managing leads and opportunities
- Managing customer project key information
- Managing ECI inquiries

In addition to these above-mentioned features, Salesforce includes also build-in capabilities for building dashboards and reports which are widely used among the company. The difference between of report and dashboard is that whereas Salesforce reports are displayed traditionally in columns and rows, dashboards are visual display of this data. Dashboards also allow to present multiple reports side-by-side using dashboard components. Dashboard components can be used to show charts and graphs. The components can also include key performance indicators (KPI) that are quantifiable measures of performance over time for specific strategic objectives.

Some companies are also using CRMs to store their sales quotes in the CRM application. In this case, however, the company has different applications for sales quotes management. Only one division has integrated their sales quote application with Salesforce so that they can send their quotes to Salesforce as opportunities that are in “quotation” stage.

3.2 Lead and lead conversion process

The company defines leads as people with whom you might do business with, but who you do not know very well yet. Hence you need to find out if they would be potential customers or not. This process of qualifying potential new customers (prospects) is called as lead conversion process. If it turns out that the lead is really interested in buying a certain product or service from the company, the lead can be converted as an actual business opportunity. In addition, the conversion can include a creation of a new contact and / or account.

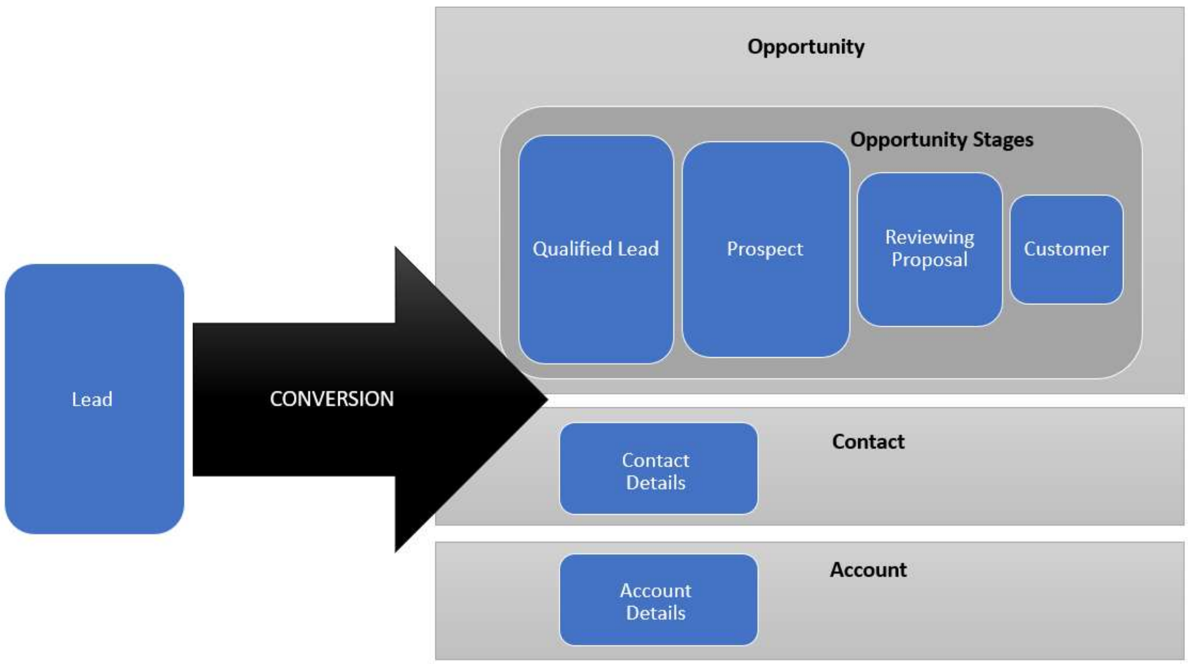

Chart 4: Lead conversion process: when leads are qualified, they can be converted to new opportunities, contacts and/or accounts. Opportunities can contain various stages.

In terms of marketing the company uses both inbound and outbound marketing to attract new leads. Inbound marketing means taking care of leads when they make the effort to contact you (Helgeson, 2017). In comparison, outbound marketing requires reaching out more actively towards leads to get them interested in a product, so it usually is more aggressive than inbound marketing. Inbound marketing also typically contains creating and distributing digital content that brings new visitors into your website and that way can connect the new leads with the marketing and sales.

The company has divided the lead process in five different kinds of lead processes: fair leads, marketing leads, manual leads, web leads and technical leads.

In the company's Salesforce the outbound leads are divided to different record types as follows:

- "Fair leads" are something that can be imported to CRM through business card scanner app that is being used when being in interaction with fair or seminar visitors

- “Marketing lead” types of leads are used only for marketing-based leads where marketing managed campaign can be related. if a lead turns to “hot,” meaning that they are highly interested in the company’s products, it is then forwarded from marketing to sales.
- “Manual leads” are created manually to Salesforce by sales users when they have met or spoken with a lead that might represent a potential customer company. In these occasions sales takes these leads forward and qualifies and unqualifies the lead without marketing being involved.

In the company’s Salesforce inbound leads contain lead types called as “Web leads” and “Technical leads” and they differ from each other as follows:

- Web Leads are generated via the company’s website when a web site visitor e.g., requests for a quote or has some questions. Web leads are directly assigned to sales for further qualification without marketing team being involved with the process at all. Assignation is based on the country and product specific leads assignment rules.
- Technical leads are used only for leads coming in from special campaigns. Technical leads are handled by TDMs.

In addition to the above, web site visitors might occasionally also send contact requests for tech support from web site. Then a case is created in Salesforce and assigned to TDMs based on product and country selection. If a web case is closed with Status: “Done - business potential,” then a lead is automatically created and assigned to sales queue based on lead assignment rules.

3.3 Opportunity process

In Salesforce, an opportunity record is the collection of fields that make up the information on a deal you are tracking (Wong, Tom & al., 2014). The manufacturing company that this research concerns uses opportunities to register deals that might have business potential.

According to Helgeson (2017), each opportunity represents a change for a lead to become a client. Each opportunity also has various kinds of details that can be used to categorize it. Those can include for instance the quality of the opportunity, source, products, and/or services involved, the value of those products and services, date of expected close, and manager of the opportunity, and the attached information can be used for categorizing and segmentation for instance (Helgeson, 2017).

Helgeson (2017) lists that the benefits of storing opportunities in CRM is that when contacts and companies are associated with the opportunities, which makes it easy to track who the key players, when to target resources to close that opportunity and with whom to discuss about the opportunity.

One of the reasons to initiate this study for the company was the fact that currently not all sales opportunities are registered in the company's Salesforce. The quotes are many times made by inside sales in separate ERP systems, for instance in SAP B1, which are not currently integrated with Salesforce. Inside sales rarely has access to Salesforce, but the sales users have widely requested an integration between the ERPs and Salesforce so that they would have visibility to the ongoing sales that is happening in the ERP side. Due to these facts the sales funnel in the company's Salesforce is incomplete.

It is common that many companies collect valuable data about their business processes and customers. If a company has collected customer-related transactional data, the benefit according to Rouhiainen (2020) is that this type of data can be used to create simple AI application that can provide predictions and recommendations related to transactional data and how to optimize it. The general benefits that the organizations may get when implementing AI and machine learning, according to Rouhiainen, include:

- Improvements to almost every business process through automation
- Increased productivity
- Faster and more accurate business decisions
- Better new products and services through innovation
- Better and more personalized customer service.

3.4 Artificial intelligence

In overall there is a high potential in the Artificial Intelligence (AI) powered CRM solutions. It cannot be argued that organizations using Artificial Intelligence can improve their efficiency and gain new business opportunities using their big data. Regarding the maturity of the AI powered technology, the topic has been relevant already for decades, but according to McKinsley (2017) AI is now finally starting to deliver real-life benefits to early adopting companies. This makes sense especially if you compare the development lifecycle to Clayton M. Christensen's (1997) original argument about disruptive innovations: according to Christensen's theory the disruptive innovation is at first applied to a small, unattractive niche, and it seems easy to ignore. Eventually it matures, quality improves, and then switches over to the mainstream. Efficient use of AI powered CRM solutions will have its advantages for the companies utilizing it. However, it is good to remember that before deploying these solutions organizations need to have to get the right digital assets and skills in place to be able to effectively deploy AI (McKinsley, 2017).

4 Methodology (research and development methods)

4.1 Demarcation

To scope of this study was to perform a holistic review to identify various kinds of development areas in Salesforce. The overall intention was more focused on the overall recognition of development areas. Our aim was that as an output of this research we would get a list of recommendations and action points on how our Salesforce should be developed in the future.

4.2 Problematics

The main target of this study was to find out the primary areas of improvements in Salesforce. According to our knowledge, there were at least three fundamental issues which have already been identified regarding the use of Salesforce in the company. These areas include:

- sales management is not committed enough for the use of Salesforce
- sales quotes are done in different source systems, which are not integrated with Salesforce, and the scattered application portfolio leads to gaps with the sales opportunity data
- issues with the Salesforce usability and User Interface / User Experience (UI/UX) design

Firstly, the company's CRM Core Team has discussed that one of the main reasons why Salesforce may not be utilized as well as it could be is that it is lack of the commitment from the management. According to literature, management's commitment is crucial in terms of wider CRM adoption, because it is not only the investments in IT or the existence of CRM platform that make companies succeed in their businesses. Even though the study of Garrido-Moreno, A. & al. (2014) suggest that different technological resources should be integrated throughout an organization to generate valuable results, the same study highlights that in order to success with the CRM initiatives it is essential that knowledge management and organizational commitment need to be fostered by top managers: "Organizational commitment has shown to be the most relevant driver of CRM success, and managers are directly responsible for gaining the commitment and involvement of the entire organization", Garrido-Moreno, A. & al. (2014) write in their findings. The issue in regards the lack of management's commitment was also recognized by Adrian Payne already in 2005 when he wrote that he had found several instances where detailed employee training is in place but there is no supporting executive briefing or executive development (Payne, 2005). Payne (2005) suggests that CRM initiatives should usually include both employee training and executive development activities. This would be a suitable time also to review if the use of Salesforce supports the implementation of company's sales strategy in practice. In an ideal world Salesforce would support sales strategy implementation for example by enabling key account planning in Salesforce in a way that the sales users could have their targets set in Salesforce and thereby they (together with their managers) could monitor their yearly progress of sales activities.

Secondly, the company also has a scattered application portfolio which includes for instance several country-specific ERP systems which are not integrated with Salesforce. On the other hand, in the scientifical publications it has been acknowledged that most organizations with large numbers of customers to manage, require a combination of sophisticated technologies to implement CRM. According to Sharp (2002), for instance, four major areas of technology contribute to a successful CRM project include data warehousing, database management systems, data mining and business analysis software. The function of data warehousing is to support decision-making process, provide the capability for businesses to provide easy access to data and to manage customer relationships more efficiently and effectively. Many organizations also use data mining to analyze customer data and the gaps in the customer management related processes. The common issues with separate ERP and CRM systems appear as ineffective processes because usually the data also needs to be manually filled in separately in two different systems. Furthermore, manual entries for two separate systems can easily lead to mistakes with the input and hence cause further problems. Garrehy (2021) says that the benefits of integrating the two systems, ERP and CRM, include faster time to market, improved cash flow and increased agility.

“Industry analysts agree that manufacturing firms need to create a clear ERP and CRM strategy to ensure they are using the latest and most comprehensive data available. Manufacturers who have integrated their CRM and ERP systems have gained critical insight into what they can offer and deliver to their customers,” Garrehy (2021) writes.

Thirdly, according to the user feedback that the CRM team has received, the current Salesforce application tends to be too complex and difficult to use at least for some users. The company-wide Salesforce implementation was rolled out in 2016, but the Salesforce application instance (or org as Salesforce tends to call it) has even longer roots than that. The initial Salesforce org was released already in 2008, so the Salesforce org has a long history and there has been a lot of custom development made in it over the years.

A study made by Garrido-Moreno, A. & al. (2014) indicates that the use of CRM, if properly implemented, has positive effects on company results, improving profitability and market share and increasing sales income and creates value for customers by improving customer satisfaction and loyalty. The results of the same study show that the human factor is critical to the success of a CRM initiative because organizational commitment exerts the most relevant direct impact and exerts an indirect impact through knowledge management: “It is important to emphasize that organizational commitment is an integrative variable that comprises different factors such as top management support and commitment; leadership; employees' commitment; and training and rewards systems", Garrido-Moreno, A. & al. (2014).

Additionally, there has been an ongoing discussion on how the company's Salesforce could be improved so that it would be more user-friendly. When filling in information to the system, the current implementation is lacking for instance smart predictions which is causing some extra effort for the users when they need to fill in some self-explanatory information. On the other hand, the possibilities of AI are not used either.

This was also a suitable time to review if the current operating models are still up to date. Understanding information and making decisions based on it, as well as reacting and acting based on information, are important activities in customer relationship management. For this reason, CRM, and Business Intelligence (BI) systems play a particularly significant role in the company. Now, many of the current reports and dashboards in Salesforce for instance are traditionally created to show what the sales has been done in the past without no visible KPI's shown. Especially the CRM Core team has lately demanded that the focus with the reporting should be more forward-looking instead and we should use measurable results with visible KPI's as a basis with the reporting.

The aim was that the results of the research could be used to build the near future roadmap for the CRM development. We hope that some of the collected findings in this research could also be used as a base for building the vision and strategy around the company's CRM.

4.3 Research approach

The research method in this study was participatory design, which evolved in the 1970's in Scandinavia. An important part of the participatory design is that end-users can act as full participants in the design of systems that will have impact on their jobs and their work-live (Muller, 1993). The aim of the participatory design is to find more intuitive, more creational, and effective working methods to people who use technology (Suchman, 1993).

Participatory design method was selected over others because it is an approach that involves users in the design development process to ensure the result satisfies their needs and is usable in practice (Kensing, F., Blomberg, J., 1998).

In the research, we performed a needs analysis to develop the Salesforce application from the sales user's point of view. For this purpose, we adapted a three-stage strategy that combines Salesforce user survey, sales management interviews and Salesforce usability analysis.

As a result of the research, a set of recommendations was created that tell how Salesforce should be developed in the future and how to get top management more committed to the use of it.

4.3.1 Salesforce user survey

First part of the study was to make an internal internet survey to collect feedback from the company's sales users regarding their Salesforce usage, most used capabilities, and their needs in general. The survey was sent to over six hundred active Salesforce users who have sales or sales management profiles.

4.3.2 Sales management interview

To involve and challenge the sales management to develop Salesforce, we made an interview where we interviewed nominated sales directors. The meaning of the interview was important for CRM team as the aim was to get a better understanding of the current sales planning model so that the team would be able to contribute to the CRM related sales development discussions more effectively.

4.3.3 Usability analysis

The CRM team of the company is constantly aiming to improve their Salesforce platform so that it would most efficiently support the company's sales processes and be as smooth user experience as possible. Based on the feedback that we have received we have identified that one of our main targets for the near future will be to improve the usability of Salesforce.

Usability is an important quality of a user interface. Nielsen (2003) lists that usability is dependent on five different qualities of the interface: learnability, efficiency, memorability, errors, and satisfaction. The assumption is, that the better quality there is in these areas, the happier the end users will be with the system.

The current Salesforce implementation is said to be too complex for some users and containing too much information that is irrelevant for some user roles. One of the reasons behind this can be that the company's first Salesforce implementation was initially rolled out already in 2008, and as the development has continued ever since with multiple consulting partners, it is a suitable time to pay attention to the usability by performing a usability analysis for Salesforce. To succeed in this target of improving the usability of the application, we did a usability study as a part of this research in co-operation with one of Salesforce consulting vendors that the company is using. The vendor performed a heuristic usability analysis and arranged six user interviews as part of the study.

4.4 Methods of data collection

First part of the study was user survey, and it was performed in November 2022. Questionnaire was sent to over six hundred sales users who had user account in Salesforce. The questionnaire was browser based so all the answers were saved in digital format. The questionnaire included both types of questions: open-ended and close-ended.

The second part of the study was sales management interviews. There were two interviews, where first was done remotely and the second was face-to-face interview.

The third part of the study was Salesforce usability analysis, where an external consultant performed a heuristic usability analysis to Salesforce. In the usability analysis there were six user interviews, where the interviews took approximately one hour per interviewee. As an output we received helpful recommendations on how to improve the usability of Salesforce.

4.5 Methods of data analysis

In the user survey we combined both qualitative and quantitative analysis methods to determine what would be the most crucial development areas the sales users experience. The quantitative methods were used with the closed-ended questions to identify how different user roles and groups are using different capabilities of Salesforce while the qualitative methods were used to identify patterns in the open-ended questions (e.g., to find out what different development areas the users were raising up and how the CRM team could better respond to their needs).

In the management interviews we used thematic analysis to identify the most important development topics from the management point of view.

In the Salesforce usability analysis, we decided to use heuristic evaluation method. In this part of the study, we applied the Nielsen's (1994) ten usability heuristics for User Interface Design, which can be seen been globally quite widely used as a broad rule of thumb for making a usability reviews. The heuristic principles include the following aspects:

- Visibility of system status
- Match between system and the real world
- User control and freedom
- Consistency and standards
- Error prevention
- Recognition rather than recall
- Flexibility and efficiency of use
- Aesthetic and minimalistic design
- Help users recognize, diagnose, and recover from errors
- Help and documentation

4.6 Evaluation of the development task

CRM team analyzed and reviewed all the results. After our review, the outputs were presented with the business stakeholders in the CRM Core team. The issues that are seen to be relevant areas of improvements in the future will be picked up as development items in the CRM development backlog.

5 Needs analysis for prioritizing key development areas in Salesforce

As mentioned, in this research we did a needs analysis to develop the company's Salesforce Sales Cloud CRM application. Research methods contained a user survey, usability analysis and management interviews.

As a result of this study, we got a list of recommendations on how to improve the current application so that it would better serve the needs of the company's sales users. The results of the study should play a key role when planning the Salesforce development roadmap for the future.

5.1 User survey

First part of the study was a user survey which was appointed to Salesforce users from the sales.

The aim for the survey was to get a good basic understanding on how the sales employees use Salesforce and what features they use. This part of the survey was covered with the following questions:

- What Salesforce capabilities do you use frequently?
- How often do you use Salesforce?
- What would make you use Salesforce more often?

The second part of the survey concerned with the training needs. The questions included:

- What type of Salesforce usage training would you need?
- What are the training areas that you would need most help with?

The third part of the interview was to find ask what sales users see are the primary areas of improvements. It included just one question:

- What do you suggest being prioritized development areas in Salesforce?

The fourth part of the survey dealt with Lightning Synchronization, an email integration product that Salesforce will be decommissioning by 2024. The meaning of this part was to understand how well sales users are currently utilizing the email integration. Collecting this information is important because Lightning Sync is decommissioning functionality which needs to be replaced by other email integration products soon, so we need to have a better understanding about the current usage of Lightning sync. This part of the survey was covered with three questions as follows:

- Do you use Outlook-Salesforce calendar sync?
- Do you use Salesforce Outlook Add-In for creating new records to Salesforce?

- What do you use Salesforce Outlook Add-In for?

Finally, it was also interesting for us to know how much users are using traditional desktop applications and how much they are using Salesforce mobile app. Those questions related to desktop and mobile app usage preferences were:

- How often do you use Salesforce mobile app?
- What would make you use Salesforce mobile app more often?
- Which user interface do you prefer?
- Why do you prefer that user interface?

In addition to below mentioned questions, the survey also included three questions regarding respondents' background information:

- Which division are you from?
- Which Sales Area do you work for?
- Which role do you working in?

5.1.1 Data collection

The survey was conducted in November 2022. It was done using cloud-based online survey tool SurveyMonkey. The survey was sent to 645 sales users covering all divisions and roles of ASM, RSM, TDM, Sales Management and Sales Development.

The responders had two weeks to respond to survey. A reminder email message was sent after the first week for those who had not responded so far.

The survey includes both open-ended and closed-ended questions.

5.1.2 Results

A total of 258 sales users out of 645 answered the survey meaning that the response rate was high: 40%.

According to the survey results, Salesforce is mostly used for managing customer visits and activities: 59% (153) of the respondents answered that they use Salesforce for that purpose.

A little bit more than half, 51% (131) of the users also said that they are using Salesforce for managing leads (131), and 32% (83) of the respondents use it for managing opportunities (83).

Every fourth (65) of the users answered they are working with projects in Salesforce.

The following capabilities were not so popular among the respondents: managing brand / partner programs 13% (33), managing account plans 12% (31), managing exceptional customer inquiries 10% (25). This was a well expected results as not every sales user needs to work with brand or partner programs, account plans or ECIs.

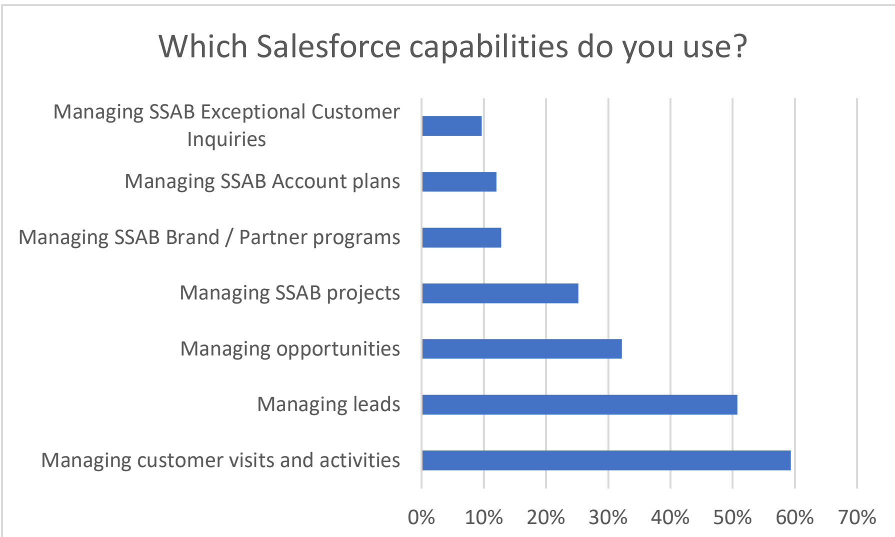

Chart 4: The popularity of different Salesforce capabilities

According to the survey results, Salesforce is in active use in the company, and those ones, who use Salesforce, seem to use it at least on a weekly basis.

A significant majority of the respondents, 83,3% uses Salesforce at least weekly: 32,9% (85) of the users uses Salesforce every day, 29,8% (77) about 2-3 times in a week and 20,5% (53) weekly.

0,5% (13) of the respondents use Salesforce bi-weekly, 0,8% (20) once a month and 0,4% (10) less than once a month

When asked, what would make you use Salesforce more often, the answers could be divided into four different categories:

- Working culture related factors
- Usability related factors
- Integration and data related factors

- Miscellaneous factors

Salesforce usage: Working culture related factors

Based on the respondent's input, the working culture has a significant impact on how different teams are using Salesforce. Different teams have separate ways of utilizing Salesforce and following KPI's. Some of the working culture related feedback regarding what would make sales users use Salesforce more often included:

> "Better understanding of the possibilities to utilize the tool for business follow-up. We do not have the culture to use the tool and make business sense with it. "
>
> "It's a complex tool, if I would have a better understanding of a limited features useful for my role, I would use it more often."
>
> "That the whole team use SF and register all interesting stuff about customers."
>
> "If my sales team were on Salesforce. I used it daily in a previous role."

It might be so that teams are lacking the understanding about the capabilities of Salesforce so individual users might be a bit uncertain of the use case of it:

> "I'm selling (product X). I'm not sure what this tool can help me with. So actually, I don't know what can make me use this tool more often."

Users don't seem it relevant to fill in the smallest orders into Salesforce.

> "(I would use it more often) in case of bigger orders (more than 10 tons)."

Salesforce usage: Usability related factors

Another aspect when it comes to using Salesforce more often was the usability and easiness of use. This included at least the lacks in the UI design:

> "(If it was) Easier to use."
>
> "If it could be simpler and more user friendly."

One practical example on how to improve Salesforce adoption was related to registering customer activities:

> "For filling out a meeting, there are several fields that require filling out, and it's mandatory. Some meetings are smaller than others - the responsible salesperson should be allowed to determine what information is relevant or not."

In overall, it was good to hear this feedback from the survey members at this point of the study because the last part of the research will cover usability analysis. The plan with that part is to go a bit further into details with the usability issues and give actual recommendations on how to fix those.

Salesforce usage: Integration and data related factors

The current scattered IT application portfolio could be clearly identified from the respondents' answers. Several respondents said that integrations with other systems would make sales use Salesforce more often.

Most of the integration related needs concerned the ERP systems where the quotations are being made, for instance SAP B1:

> "Full integration with sales data (would make use Salesforce more often). Possible to do follow-up on sales towards a specific customer. Full integration with RFQ and Quotations - and possibility to do win/loss analysis."
>
> " That (if it would be) connected with (SAP) B1."

It also seems that some roles find the information they need already from another systems and reports.

> "If my role would change. Today I check more data e.g., from separate Power BI reports or CDW reports."
>
> "Nothing (would make use Salesforce more often), because I have most of needed information in SAP and some local business programs."
>
> "Salesforce is a good tool to store the customers visit reports. Nevertheless, it's a double job for RSM who are already reported their visits on the weekly report. I don't have an answer but a question: how to make it more efficient and more friendly to RSM? We need to understand what the benefit for the RSMs, and the company is."

Salesforce usage: Miscellaneous factors

There were also a couple of miscellaneous feedbacks regarding what would make them use Salesforce even more often.

One respondent wished that there would be a possibility to set targets and follow-up against them in the dashboards:

> “Now I always need to move the numbers to our scorecard to show status against targets. I would love to show Salesforce instead to drive usage and attention.”

Another person mentioned that geographical mapping capability could be useful in Salesforce:

> “I use it for nearly everything already, but if there was a mapping capability, showing all of my customers, and color coded by last visit, it would give me much better tools to schedule visits within a tight geographical area.”

A couple of the respondents thought that their time is so limited that they do not have enough time to use Salesforce. If that would change, they said that they might use Salesforce more often.

> “I need to have more time.”

Training needs

The second part of the survey concentrated on training part of Salesforce. Most popular ways of learning were video tutorials and experience training, but as different people have different individual ways of learning things, also the traditional ways of learning were requested.

Most of the users, 61, responded that they would need short training videos to get better onboarded to Salesforce usage.

> “I prefer training videos; we can go to the training at any time and go back to them when we want.”
>
> “I'm new to the company so any training videos, instructions would be helpful.”
>
> “I guess we should continue sharing the new developments and creating videos where people can watch "on demand".”

Video tutorials were seen as an effective way to learn especially new features:

> ”Training videos to be able to refresh ourselves:”
>
> “(I would need) training videos, too many new functionalities.”
>
> “Training videos how to be more efficient in salesforce.”

Experience sharing was the second most popular answer for users in terms of training needs: 31 users mentioned that in the survey.

> ”Tips & tricks that makes work easier, experience sharing from people who use Salesforce every day in a similar job.”
>
> ”Experience sharing in specific topics may be interesting.”
>
> “Experience sharing - what is the added business value.”
>
> ”Experience sharing, demo for practical use.”

Seven users mentioned that the traditional trainer-led training could suit the best for them. Furthermore, 12 more users responded that basic trainings would be needed to cover all general topics and basic training for new users.

> “Actual training, like a couple of days in place dedicated to Salesforce, e-learnings, videos, sessions are all just a way too easy solution to be able to say that the employees "sure do" get learning in the systems.”
>
> “Training face to face, it´s better for me”

Some specific areas of training that were mentioned in responds included:

- Activity management (entering visit information)
- Marketing related functionalities
- Mobile App
- Opportunities and Offers
- Leads (process and conversion)
- Reports and Dashboards
- Role specific features (e.g., how RSM/ASM/TDM should use Salesforce in daily work?)
- Synchronizing emails between Outlook and Salesforce
- Using division specific data

Prioritized development areas

There were five main themes that could be identified from the respondents' responses:

1. Usability and UI/UX design
2. Integrations
3. Prices and quotes
4. Strategic planning and selling
5. Training and support

Usability and UI/UX design included feedback on making registering information in Salesforce more simple and faster, but also making information to be easier to find:

> "The system shall not force us to what to do, must be the opposite."
>
> "Simplify the use. Right now, there are too many options."
>
> "Our implementation needs to be simplified. Nowadays it's a mess. As a result, information is difficult to find."

Responses related to integration development theme did not bring any new surprises. The feedback was mostly the same as in the first part of the survey (See: Salesforce usage: Integration and data related factors) and was mostly referring to the lack of SAP B1 integrations.

However, the third identified theme, related to prices and quotes, was a new finding. The users requested that Salesforce should support:

- Sales configurator (CPQ tool) in Salesforce app or a possibility to use Sales configurator without being logged in to corporate network
- Entering quotes and converting quotes to orders through Salesforce
- Offering all products from different divisions directly from Salesforce to the same customer

The fourth theme was related to strategic planning and selling. It was stated that Salesforce development should be aligned to company strategy, volume, pricing and NNC (net new customers) (Examples: Company target for high volume accounts visits, Accounts related to strategic products). Respondents requested the implementation of annual action plans and action plans dashboard to follow up the progress with the KPIs. It was also mentioned that the involvement from all parties that are supposed to use Salesforce is required including internal discussions in all levels about the facts why the company is using Salesforce and what benefits can be gained when using it.

The fifth theme concerned training and support. The feedback with the training theme was basically the same as in the training related survey question (See: Training needs).

Email and Calendar integration

Based on this survey, only 34,1% (88) use Salesforce's email and calendar sync (Lightning Sync). This means that almost two thirds of the respondents, 65,5% (169) does not use the email integration at all.

Only 9% (22) users use Salesforce Outlook Add-In for creating new records to Salesforce, leaving the remaining 91% (235) of the users out from the productivity benefits of it.

Furthermore, Salesforce Outlook Add-In seems to be mainly used for creating new contacts and updating existing contacts, but also for creating new leads and logging in email and attachments to Salesforce.

Mobile app usage

In accordance with the survey results, about a half of the respondents use Salesforce mobile app.

When asked how often you use Salesforce mobile app, the result was:

- 3 % (7) of the users uses mobile app every day
- 8% (20) uses mobile app about 2-3 times a week
- 10% (27) uses mobile app weekly
- 6% (16) uses mobile app bi-weekly
- 22% (57) uses mobile app once a month or less
- 50% (130) never uses the app

Regarding the UI preference, 91% (234) of the users prefers Salesforce's traditional desktop browser UI, and only 9% (22) likes to use mobile app instead of desktop.

The reasons why many users seem to like the desktop version seem to be the better overview on the application and the bigger screen.

> “App is very good, but it is easier to work from desk with big screen (than via mobile when I am travelling).”
>
> “Because I like to work on a big screen.”
>
> “Screen/text (in app version) is too small. I don’t consider salesforce as a decent mobile app but maybe an iPad or something bigger might make it easier to use.”

However, there were also a couple of respondents that were not aware that the mobile app exists, or they did not know what the benefit are of using mobile app, so there could be a need to revisit the benefits of the mobile app.

> ”I was not aware of a Salesforce app. I think there's a lack of training and information for new users who are not Sales. But I understand if that's not the focus.”
>
> “So far, I didn’t know about its existing. For sure it will be more useful in case of working” out of the office.”
>
> ”Maybe computer version is safer? And what is wrong with PC version if the job is done?”

Those ones, who preferred mobile app over the desktop version, were saying that the app is fast and easy to use when travelling, although it also has some restrictions with the functionalities if compared to the desktop version.

There were also users who thought that there is a space and use cases for both versions:

> “I am using both. Writing reports is faster on computer, but app is great, when you are travelling, and you need to check anything quickly.”
>
> ”Actually, both are user-friendly.”

There were also at least six users who had issues logging in to the app. It could make sense to have info sessions regarding login issues so that the users could use the app even after their passwords changes every now and then due to company IT security policy.

5.2 Management interviews

As a part of this study but also the CRM roadmap planning, we have identified that creating a vision and strategy for our Salesforce CRM is one of our main targets in short-term. Hence, we asked two sales directors to contribute to this discussion in the form of an interview on behalf of their division.

The objective of the interview was to know more on how sales management is benefiting from the Salesforce data and how you are using Salesforce to manage their sales teams (e.g., setting up KPI’s and following up those).

5.2.1 Interview respondents and questions

We chose to interview one sales director from two different divisions that are using Salesforce. Both interviewees have over 8 years of experience working at the company, and both have even longer work history in the company’s subsidiaries.

The key questions we asked from the Sales Management included:

- How do you plan for next year?
- What tools do you use for sales planning?
- What different sales activities do you plan using Salesforce?
- How do you track the actualized activities vs. KPI’s?
- To make using Salesforce more meaningful and increase usage, what else should be available in the platform?
- What feels too complicated in Salesforce?
- What would motivate you to use Salesforce even more?
- What do you wish sales (TDMs, RSMs and ASMs) would do differently or more in Salesforce?

The first interview was done remotely due to long distance between the office sites. The second interview was done face-to-face in the office.

5.2.2 Interview results

According to the interviews, different teams have diverse needs when it comes to the use of CRM.

Based on that management is giving their permission for different sales teams to act in separate ways depending on different needs in different areas.

> “We’re using it in some teams, but it's not mandatory for us to enter all the opportunities. So, we have decided on an ambition level in the team that when it comes to Salesforce for the sales to have huddles and to work through the strategic initiatives.” (Interviewee 1)

Even though CRMs are typically built around opportunity pipeline, in this company's case the primary focus with the Salesforce does not seem to be in the opportunity management, as the opportunity management plays just a small part in the big picture. That is how the company's management sees the thing because the major focus with the sales needs to be on having quarterly agreements in place and on delivering on those agreements instead of managing offers and keeping track of those.

> "We don't see the benefit of entering it (opportunities) in into Salesforce." (Interviewee 1)

Apart from the opportunity management, if contracts play a key role in terms of sales planning, Salesforce should provide at least visibility to account specific frame agreements, if not even provide the capability to manage the quarterly agreements. This requirement should be considered when planning the roadmap for the future.

Although the management does not see it useful that all teams should use opportunities, for lead handling they see Salesforce much more useful.

> "We were expected to do a lot in the system and now we have narrowed it down so we know what we will do, and I feel it's that the right things that gives us business opportunities and the best part of Salesforce - I would say that is the lead handling. You know when marketing creates leads from the web or from seminar webinars" (Interviewee 1)

Regarding strategic planning, annual planning is not done in Salesforce, at least yet, but one quite clear use for Salesforce would be to integrate strategic sales and planning tools into it. Account planning, which is also a way of strategic planning, is currently done for prioritized global customers, but not done in Salesforce either. The underlying issue is that there is currently no way for CRM users to see strategic or prioritized accounts in Salesforce. However, the things might change soon because new strategic planning tools are being developed and those are soon to be rolled out in both divisions, as both divisions have a little bit different sales processes and hence require their own annual and account planning tools

One of the key findings with the interviews was to simplify the Salesforce UI for different user personas. The interviewees believed that this could improve the utilization if it would lead to easier usage of the application.

> "In my opinion I would say we should simplify. Simplify. There might be thousands of reports, but I need only three." (Interviewee 2)

> "In another way, it's pointless to have so much. It's an overwhelming number of reports and fields and methods, I would say, that is in Salesforce. I don't know why, but we have a long history of it and maybe it has been different. Different management have been prioritizing different things. But to me it's not very obvious who's owning the system." (Interviewee 1)

The meaning of the last sentence in the above-mentioned citation is quite remarkable. If it is unclear for the sales directors that who works as business owner for Salesforce, then this is something that needs to be more clearly communicated within the organization.

Another thing that was mentioned during the interviews, which does not currently support sales management's needs, was weekly reporting for the teams. For that the sales teams are using other tools like emails, for example. There is, however, an ongoing pilot project for TDM's to bring weekly reports to Salesforce and the results from that project could work as a nice showcase for other teams as well, if they are pleased with the new features that they will receive.

One newly identified and potentially useful capability would also be an integrated AI tool, which could be used to summarize sales users' weekly reports. If that would work in practice, it would save a remarkable amount of time from the management's viewpoint:

> "I have a 30 people who will be preparing (weekly reports) or who are feeding the data into the Salesforce. So, I'm not sure would it be more efficient if I have to walk through all that data from the Salesforce, and how to actually prioritize the data so as I don't have to read all that we make? 30 people making four customer visits per week, so ideally, I would be around 100 customers in. I can't do that."'

When asked about what would be needed to be changed in Salesforce so that Salesforce would suit better for the needs of Sales Management, the other interviewee responded that he would like to integrate market data, pricing data and industrial trends in Salesforce.

> "How to get customer data and market data. So not only data from the customer, but (that) combined with the market trends and pricing trends with one click from one that reports in Salesforce. "(Interviewee 2)

It this is something that would lead to sales management using Salesforce more often, it could make sense to continue the discussion later in the form of requirement gathering.

5.3 Usability Analysis

External vendor conducted as Salesforce usability study to find development opportunities to firstly enhance user experience and productivity and secondly to improve data accuracy.

Analysis was performed using heuristic evaluation approach which aims to reveal insights that can help enhance usability. As a result, there will be a list of discovered usability issues, where and how they appear and potential solutions to solve them.

5.3.1 Data collection

Study consisted of six user interviews and a heuristic evaluation of selected parts of the company's Salesforce user interface.

As part of usability analysis, a total of six interviews with a duration of approximately 1 hour was conducted with sales end-users. The users had varying experience with Salesforce, and they were asked questions relating to their background, current work, and Salesforce usage as well as "could you show me how…" to understand how they use the application.

The interviews were recorded to enable later analysis. The results of the interview were presented as anonymous findings. After collecting the results together, we asked an experienced Salesforce consultant to review the findings and give her suggestion for fixing the issues.

The interviews covered three different types lead processes, updating information, lead qualification and conversion process and making updates in Salesforce records.

Besides lead processes, there were also multiple other topics that interviewees showed interest in discussing about their Salesforce usage. These topics included for instance reporting, quote creation, business intelligence and communication within team.

5.3.2 Usability analysis results

Observed issues were classified in four urgency categories which were: critical, high, medium, and low. In this study we wanted to concentrate more on the critical and high priority issues instead of medium and low priority issues as we presume that the critical and high category issues would require more urgent fixes than medium and low priority issues.

Category No.	Priority / Urgency	Explanation
1	Critical	Usability catastrophe: imperative to fix this before product can be released
2	High	Major usability problem: important to fix, so should be given high priority
3	Medium	Minor usability problem: fixing this should be given low
4	Low	Cosmetic problem only: need not be fixed unless it is easy

Table 1: Usability analysis result categories with explanations

None of the findings were critical issues, and most of the findings were just medium or minor issues. However, there was a total of eight high priority issues.

Priority / Urgency	Number of observations
Critical	0
High	8
Medium	14
Low	23

Table 2: Number of observations per categories

General themes

There were some general themes that could be identified from the interviews. Those included:

- Integrations

- Data improvements via automations
- Off the shelf solutions
- Autofill features
- Development support

Regarding integrations, especially the lack of integration between Salesforce and SAP B1 system, which is used in some countries for quotes creation due complex tax rules, was seen important. The current situation is that in those areas all quotations are manually brought from SAP B1 to Salesforce for tracking their progress and processed there, so the process is manual and heavy and could benefit from integration.

Users would also appreciate if filling in data would be easier. Hence all automations, workflows and autofill features would be seen valuable in terms of productibility.

More in detail examples of these themes can be found in the below table.

Theme	**Practical areas of improvements**
Integrations	• Importing data from other systems (such as quotes from SAP B1)
Data improvements via automations	• Automations to collect information or make extra notes about the assignment to the partner (and use the information following the Opportunities and reporting them).
Off the shelf solutions	• Einstein Activity Capture to improve on existing email workflow
Autofill features	• Recommend existing contacts • Recommend from existing client databases (addresses etc.)
Development support	• Help in integration and development tasks from org. • Reporting templates and structures

Table 3: General themes found in the interviews with practical areas of improvements

In terms of UI design there were three main themes that should be focused on in the future to be in align with the best practices. Those include Mass editing functionalities, layout clarity and focus on mandatory and often known.

Theme	**Best practices to follow**
Mass editing functionalities	• Contact information editing with limited back and forth • In-line or specific report for editing content
Layout clarity	• Minimizing unrelated information by users' area or role • Easy shared dashboards with specific filtering per person or area
Focus on mandatory and often known	• Mandatory information front and center • First to know information forward and top

Table 4: UI design best practices to follow

High priority issues

There were eight high priority issues identified in the usability study. These issues are listed and described in more detail in the following table:

Priority	Observation
High	User should be able to mark and view who is the primary Contact for the Account Currently nothing indicates who is a primary contact when approaching or visiting, not obvious in UI.
High	There should be a way to create standardized and shared reports within Salesforce.
High	There should be a way to create shared dashboards and send them to others by link (like Power Bi user experience), or guidance on how to do it directly in the UI).
High	There is a need to track evolution from lead to opportunity and various stages, sales need a way to create an opportunity from lead that will update information such as status (qual or un-qual based on won lost). So far this has been circumvented by adding a linking information from opportunity to lead manually.
High	Currently in one of the areas all quotations are manually brought from SAP B1 to Salesforce for tracking their progress and processed there. Currently no easy way to import in bulk directly to customers so created a separate Account that gets all quotations and are later matched to proper accounts. The process is manual and heavy and could benefit from integration.
High	Outlook integration with Salesforce unclear for first time users, many assumed that all email correspondence such as email chains would be registered. Currently existing Outlook integration does not recognize email chains and update automatically. Integration is also slow to load on first open, took ~30 sec to open.
High	There is currently no effective way to see and follow the whole lifespan of Lead, Opportunity, Won. Users cannot get information and success stories so they cannot evaluate effectiveness of different lead types.
High	Continued from previous, a means of following through leads and the value they generate would beneficial. Currently overcome by using Campaigns to designate for example fair leads. Solutions from users include input field of opportunity origin either filled by sales or by system itself, and a means of visualizing them in a dashboard.

Table 5: List of high priority issues

Medium and low category issues

There was a total of 14 medium- and 23 low-categorization issues identified. These issues were something that could be linked to already recognized needs (like simplifying UI) or then related to training specific needs for instance, so they do not play so significant part in terms of this study. Therefore, these issues are excluded from this research.

Recommendations

The recommendations were grouped by different categories that could be identified. The improvement categories with number of different findings per category are listed in the table below.

A big portion of the issues, twelve in total, were related to dashboards and reports. Most of the recommendations were related to replacing custom functionality with Salesforce's standard out-of-the-box features. Certain areas were something that can be improved easily just with appropriate user training.

Recommendation category	Number of improvements
Develop dashboards and reports	12
Implement standard configuration	17
Improve Instructions	7
Miscellaneous	13

Table 6: Recommendation categories with number of different findings per category

The high priority observations were analyzed, and list of action points were planned based on these observations. Recommended action points can be found in the table below.

Observation	**Recommended action points**
User should be able to mark and view who is the primary contact for the account. Currently nothing indicates who is a primary contact when approaching or visiting, not obvious in UI.	A simple solution is to add a Primary checkbox to Contact object. Contacts can be sorted by default so that the primary is first in the list. However, it should be thought through, will the same Contact be primary for all users, can there be many primary Contacts, should there be only one, should the checkbox be emptied when contact no longer works for the account etc. It is also possible to add a lookup field to account object, where primary contact would be filled in. This solution is not as flexible as the checkbox.
There should be a way to create standardized and shared reports within Salesforce.	Recommendation is to use standard reporting features. A good practice is to gather commonly used reporting templates to a Folder, to home page or to a Dashboard. This helps users find them. (the way the report and dashboard library are done). Reports can be setup so that they contain the most used filters showing all values by default. This way it is easy for the user to edit the filters and only run the report, not save it. It is also a best practice that all users should not be able to save reports in common Folders. However, certain

	users can be given the permission to do that for their teams for example.
There should be a way to create shared dashboards and send them to others by link (like Power Bi user experience), or guidance on how to do it directly in the UI).	Recommendation is to use standard reporting features and have Dashboards that are centrally managed. Dashboards can show high-level information and can contain filters. It is also possible to have dynamic dashboard that shows only my data. Important dashboards that are expected to be used a lot, could be listed, or showed in user's home page. Dashboards and dashboard folders should be structured and named with internal naming rules and shared only to users to whom they are relevant. Non-relevant dashboards and reports linked to them should be deleted. Important dashboards can be scheduled to be updated for example daily. A good practice is to gather commonly used dashboards to a folder or to home page. This helps users find them.
There is a need to track evolution from lead to opportunity and different stages, sales need a way to create an opportunity from lead that will update information such as status (qual or un-qual based on won lost). So far this has been circumvented by adding a linking information from opportunity to lead manually.	To keep the lead data solid through the entire process from lead to revenue it is important to create opportunities via lead conversion.

Currently in one of the areas all quotations are manually brought from SAP B1 to Salesforce for tracking their progress and processed there. Currently no effortless way to import in bulk directly to customers so created a separate account that gets all quotations and are later matched to proper accounts. The process is manual and heavy and could benefit from integration.	Integration between SAP B1 and Salesforce needs to be built with high priority.
Outlook integration with Salesforce unclear for first time users, many assumed that all email correspondence such as email chains would be registered. Currently existing Outlook integration does not recognize email chains and update automatically. Integration is also slow to load on first open, took ~30 sec to open.	Recommendation is to use standard configuration When using Outlook's side panel for Salesforce, all emails must be manually linked to Salesforce. However, when using Einstein Activity Capture (note separate licensing), it is possible to do the setup so that also emails are automatically linked to contact records in Salesforce. If contact roles are in use with opportunities, the link to the opportunity is also created automatically.
There is currently no effective way to see and follow the whole lifespan of lead, opportunity, won. Users cannot get information and success stories so they cannot evaluate effectiveness of different lead types.	Recommendation is to use standard configuration and reporting All information from the lead can be tracked via opportunity if standard convert functionality is used. If the lead has had for example a type, a source or it has been linked to a campaign, the connection can be reported.
Continued from previous, a means of following through leads the value they generate would beneficial. Currently overcome by using campaigns to designate for example fair	Recommendation is to use standard configuration. When the lead is converted to an opportunity (with the standard convert page) all information from

leads. Solutions from users include input field of opportunity origin either filled by sales or by system itself, and a means of visualizing them in a dashboard.	the lead can follow to the opportunity if the mapping is done and the fields are visible. For example, the source and the campaign can be shown / filled in in lead / opportunity fields.

Table 7: High priority issues with recommended action points.

6 Results

The main target of this research was to find out the major areas of improvements in Salesforce to be able to provide a better user experience for the sales users in the future. The current situation with the company's Salesforce seems to be that there is too much information visible for everyone and this causes challenges for the users when they cannot pay their attention to what is specifically useful for them. The key finding in this research was that for the future development would be in simplifying Salesforce's UI. This can be done by service design methodologies and then either creating role-based apps for different user personas, but also Salesforce's dynamic forms could provide some easy solutions for customizing different views for different users.

According to overall results of this study, the areas that are quite well utilized in Salesforce now include leads management, activity management, account management (including visibility to customer data), brand, and customer programs management and ECI processes. On the other hand, it has been said that there are also lot of leads coming in that have low-quality and therefore do not serve the sales. According to the previous study made for marketing purposes, the recommendation was that these leads should be prequalified by inside sales before sending those to sales.

Regarding reports and dashboard, there are clearly some challenges for the users to find the appropriate reports they need in their work because there is so many of them and the folder structure is complex, so one suggestion would be to perform some clean-up activities with those. A need for the reports specific training was also identified based on the user survey results.

When it comes to the user adoption, the purchased licenses are in very efficient use at the moment, so the users who use Salesforce tend to use it very often, but because of the different working policies between different sales teams it might be sometimes a bit unclear for what the application should be used for. This reflects well in the below citation logged from one of the user interviews:

> "I already think Salesforce is a very strong tool to begin with. It's just about how we adapt it to our company and to our industry and how we make it more effective."

This leads us to the responsibility issues, where according to the interviews exists some uncertainty at least in regards the ownership of the CRM. If it is unclear for sales management who is/who are the business owners of the CRM, then the responsibilities need to be clearly communicated within the organization. Business owners should also contribute on the vision and strategy planning of the CRM. The vision and strategy are needed to ensure that the CRM development is in align with the business targets and that the users would better known for what purposes they should use Salesforce for. The lack of this kind of vision and strategy was well recognized in another user interview in the usability study:

> "We have a lot of choice in how we can approach things. And unless anyone has said 'this is how it should be done' we are going to do it as we have accustomed to. What we would like to have clarity in what is expected of us in using this system."

According to another user, it also is a bit unclear to whom they should contact if they feel that they have some ideas for the further development of Salesforce:

> '"[It would benefit a lot to] make a really clear process when we need something to improve [Salesforce], and to know who is the guy we need to talk? How we can make this easier or… discuss with us [if we need development support]."

Making CRM work efficiently requires a culture that supports it (Helgeson, 2017). When it comes to the development of Salesforce, management's commitment plays a key part in making the application also support the sales strategies and enable following up KPI's. This includes creating the required interfaces between different systems, if necessary. Even though the company has already started an ERP integration project in three countries, it might be also worth creating a more detailed CRM integration strategy and roadmap for the system integrations also.

Regarding strategy and vision planning, two recommendations that might be useful to be included there could include a more future-looking approach and more efficient ways of working. According to the feedback received in this study, currently the focus with the use of CRM is more on the things that have already happened or is happening, when sales users feel that it would be more important to use Salesforce to plan for future. There could be potential also to develop the weekly reporting habits so that instead of sending weekly reports by email all reports would be filled in Salesforce instead, and then AI tool would generate summarizations of the reports to the top management.

In terms of user training, creating, and providing tutorial videos to end-users should be highly prioritized from now on, but there is certainly a demand for basic trainings in the future as well. Survey respondents thought that they could benefit on experience sharing also. This approach of experience sharing could work best inside the teams where the participants have similar kind of roles.

Regarding email and calendar sync capabilities, only 34,1% of the sales users responded that they are using the current Lightning Sync email and calendar integration. This information was important because Lightning Sync is decommissioning functionality which needs to be replaced with the next generation integration product, Outlook integration, soon and we needed to have a better understanding about the current usage of Lightning sync. After migrating to Outlook integration, the next phase should be to evaluate the additional productivity features that are available, as Lightning Sync and the Outlook Integration (which is by default replacing Lighning Sync in the future) both enable users just to manually log in emails, activities, and contacts to Salesforce. In terms of these additional productivity features, there would be two different solutions for the company to choose from: Einstein Activity Capture tool and Salesforce Inbox license. The company has one hundred free Einstein Activity Capture seats available in Salesforce, but additional seats cannot be purchased separately without Salesforce Inbox licenses. Based on survey results and the current use of the email integration there might now be enough free Einstein Activity Capture seats even for all sales users that are using the current manual email and calendar integration. However, it would be also important to evaluate how sales users would see the benefits of Salesforce Inbox features in comparison with Einstein Activity capture features before assigning the Einstein Activity Capture seats to users.

In the usability study part of the research one particularly significant recommendation was to implement more Salesforce's standard solutions instead of having own customizations. This would apply at least with the lead conversion process which is currently customized for the company and not so intuitive as the standard one. The initial reason behind implementing the customized lead conversion years ago was that Salesforce's lead conversion was not so developed then as it is today but now the times have changed and the standard conversion is much more user-friendly than the current customized one.

In continuation of the usability study part results, it was recognized in observations and solutions that rarely no "silver bullets" exists, meaning that all enhancements require some form of training and inspiring for the usage and knowledge to stick. The required action points could include:

- Activation and encouragement of sales teams by managers, peers, developers
- Success stories and highlighting features - Easy accessibility to Sales Data for client work
- "Evangelists" for Salesforce, close-by support, and trained team members besides leads
- Informing or reminding also about existing, not just new features

7 Conclusions

Payne (2005) suggests that CRM initiatives should include both employee training and executive development activities. According to this study there are certain areas of improvements in both of those.

Firstly, there is a need to clarify some responsibilities. Especially the Salesforce business owner(s) role is important to be clear for all that work in sales management, sales development, or Salesforce related development. The business owner(s) should understand the business needs and have a clear understanding of the organization's goals, objectives, and requirements, and translate those into the Salesforce CRM system. This is how it can be ensured that the development of the CRM is in align with the company's targets and the use of CRM supports those targets.

Secondly, to ensure that the use and development of Salesforce is somehow in align with the set business targets, the next step would include the creation of CRM strategy and vision. These should indicate what would be the correct kind of use of the Salesforce. Otherwise, there is a risk that the use of CRM would become as symbol for the unnecessary work, as one of the interviewees who participated in this study quite well expressed. Involving sales management with the CRM strategy and vision planning process is important because it can lead to them being better committed to the use of Salesforce. After CRM strategy and vision is created, it should be communicated throughout the organization so that also the users would have a better understanding on for what purposes they should use Salesforce for, how the sales management is following up KPIs in Salesforce and how Salesforce could support sales with the key account management model. The assumption is, that if the management clearly communicates why it's crucial to use CRM, then also employees should understand the benefits of it and be even more motivated using it.

Thirdly, there is still a constant need to provide training for the end-users. According to the survey the users would still need traditional basic training, but also providing self-learning material in the form of video tutorials and arranging experience sharing sessions would be highly appreciated among the users as well. By creating a video tutorial portal, we could support the users by providing a place where to offer learning material for users with different roles and skill levels regardless of time.

In addition to the above-mentioned training and executive development related activities, there were certain themes that should be taken into consideration when planning the roadmap for Salesforce development. One key finding in this research was that the company's Salesforce application needs simplification and that could be done in the form of creating user persona-based applications inside Salesforce. The other option would be using Salesforce's dynamic forms when possible. Whatever the final way of implementation is, service design methods should be used when identifying the different needs of different user personas. The importance of following best practices in UI Design cannot be highlighted too much either.

Other identified improvement areas were integrations, especially the lack of ERP system integrations. This need has now been recognized and there is already an ongoing POC project in three countries to integrate SAP B1 systems with Salesforce. It could be worth considering creating an own strategy for CRM system integrations as Garrehy (2021) suggests ensuring the company is using the latest and most comprehensive data available.

Finally, to make Salesforce really “smarter” than it currently is, it could now be a suitable time to start bravely exploring the new possibilities with modern technologies, like artificial intelligence for instance. One suitable target that was identified in this study was weekly reporting, where AI could combine multiple reports into one summarized version that would be shared with the sales directors. Creating a business case out of it should be easy as it should save lot of different people’s time and therefore bring positive vibes around Salesforce. If this would work, it would also inspire the organization to start applying AI somewhere elsewhere as well.

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