UNIVERSITY OF LJUBLJANA
SCHOOL OF ECONOMICS AND BUSINESS

MASTER THESIS

IMPROVING SALES PROCESS BY USING SALESFORCE TOOL AT YASKAWA SLOVENIJA

Ljubljana, June 2022 SAŠA MIHOLIČ

AUTHORSHIP STATEMENT

The undersigned Saša Miholič, a student at the University of Ljubljana, School of Economics and Business, (hereafter SEB LU), author of this written final work of studies with the title "Improving sales process by using Salesforce tool at Yaskawa Slovenija", prepared under supervision of prof. dr. Mojca Indihar Štemberger, PHD.

DECLARE

1. this written final work of studies to be based on the results of my own research;

2. the printed form of this written final work of studies to be identical to its electronic form;

3. the text of this written final work of studies to be language-edited and technically in adherence with SEB LU's Technical Guidelines for Written Works, which means that I citied and / or quoted works and opinions of other authors in this written final work of studies in accordance with the SEB LU's Technical Guidelines for Written Works;

4. to be aware of the fact that plagiarism (in written or graphical form) is a criminal offence and can be prosecuted in accordance with the Criminal Code of the Republic of Slovenia;

5. to be aware of the consequences a proven plagiarism charge based on the this written final work could have for my status at SEB LU in accordance with relevant SEB LU Rules;

6. to have obtained all the necessary permits to use the data and works of other authors which are (in written or graphical form) referred to in this written final work of studies and to have clearly marked them;

7. to have acted in accordance with ethical principles during the preparation of this written final work of studies and to have, where necessary, obtained permission of the Ethics Committee;

8. my consent to use the electronics form of this written final work of studies for the detection of content similarity with other written works, using similarity detection software that is connected with SEB LU Study Information System;

9. to transfer to the University of Ljubljana free of charge, non-exclusively, geographically and time-wise unlimited the right of saving this written final work of studies in the electronic form, the right of its reproduction, as well as the right of making this written final work of studies available to the public on the World Wide Web via the Repository of the University of Ljubljana;

10. my consent to publication of my personal data that are included in this written final work of studies and this declaration, when this written final work of studies is published.

Ljubljana, June 13th, 2022   Author's signature_____

TABLE OF CONTENTS

LIST OF FIGURES

LIST OF TABLES

LIST OF APPENDICES

LIST OF ABBREVIATIONS

CRM – Customer relationship management
EMEA – Europe, the Middle East and Africa
FY– fiscal year
RO – robot business
SB – system business
YSL – Yaskawa Slovenia

INTRODUCTION

In today's world, with highly saturated markets, companies are facing several challenges. Every company aims to be a leader in their segment market, which drives companies to improve sales performance, closely connected with improving sales processes. With the development of information technology, companies can now further face those challenges through the use of different technology tools, which gives them a competitive advantage. Gathering and analyzing information enables companies to pursue higher productivity, more easily accept decisions, develop new marketing strategies, recognize significant patterns, and meet customer needs.

Nowadays, companies are forced to think wider, not just in terms of selling but also regarding their customers. Customer relationship management with promising, automated business processes should enable companies to get to know their customers better, to the point where selling would not only boost profits but would also save time and bargain (Dyche, 2005).

With customer relationship management tools, companies can enhance customer satisfaction and therefore boost their sales performance. However, while the advantages that customer relationship management tools offer are promising, they can be unsuccessful if companies do not thoroughly understand customer relationship management. Nevertheless, more companies have reaped the expected benefits than those who struggled (Chakravorti, 2007).

One of the most used tools and platforms for customer relationship management is Salesforce, which enables saving customer information, generate leads, opportunities, campaigns and provides all history of individual customer. The organizational sales team can easily share notes and documents, enabling faster processes to inform staff members regarding the customer's history. Therefore, companies can prepare more personalized offers, save more time, and focus on sales strategies and decisions (Thompson, n.d.).

Yaskawa Slovenija is a subsidiary of company Yaskawa Europe GmbH. It offers industrial robots and robotic solutions on the territory of the former Yugoslavia. Because of its wide specter of customers, dispersed through several countries, it is even more crucial to follow and analyze organized data to stay competitive. To be able to do that, the company has implemented the aforementioned customer relationship management tool, Salesforce. As with any other company, it also faces challenges in improving the sales process through the use of this tool.

Within this master's thesis, I will present and analyze the existing situation in the company, recognize the challenges, suggest improvements, and make implements. As such, the master thesis will bring added value to the company and its subsidiaries. The results will also be interesting for the wider public, such as for other researchers and companies facing the same or similar challenges.

The purpose of this master's thesis is to contribute to the improvement of the sales process in Yaskawa Slovenija using the customer relationship management tool, Salesforce. This master's thesis will also bring added value to other subsidiaries and other companies using Salesforce in their sales process.

The goals of this master's thesis are:

− to examine and present the customer relationship management and tool, Salesforce, both from the theoretical and practical standpoint,
− to review and analyze the entire sales process tied to the Salesforce tool and to examine the current situation,
− to provide suggestions for improvements based on the examined information and collected data from other good practices and other professional sources,
− to implement some of the agreed suggested improvements,
− to examine the situation of the sales process after implemented improvements.

In this master's thesis, I have used different work methods and techniques, such as deductive conclusion, when comparing practices from professional literature to the company situation, empirical techniques when analyzing the sales process, and interviews with the employees. As such, this master's thesis is divided into two parts, theoretical and practical. The theoretical section is based on examined professional literature, where I describe tied studied topics of my research. First, I present the sales process, followed by the theme of Customer Relationship Management, Cloud Computing, and Salesforce in detail. In the practical section, I present Yaskawa Slovenija, describe and analyze their sales process in Salesforce, suggest improvements, and make some implementations, following which point I describe the interviews with employees.

1   SALES PROCESS

Before focusing on Customer Relationship Management, I would like first to explain the definition of the sales process, which is needed to further understand Customer Relationship management and connected activities for the sales process in Yaskawa Slovenija.

The sales process is a defined action of several steps taken by a company to turn a potential lead into an existing customer. Every company has its own specific, customized sales process, which usually originates from seven well known established steps, as defined by Lucidchart (n.d.):

1. Prospecting: In the first stage, companies find potential leads, who are individuals or business entities with inquiries about the company's products or services.
2. Preparation: In the second stage, companies establish the first initial contact with a potential customer. They research the market, gather information about the inquired

product or service, and prepare a presentation customized to the potential customer's needs.

3. Approach: Companies make first contact with the potential customer, typically through a meeting in person or by phone.

4. Presentation: Companies present the prepared information relating to the inquired product or service, while listening further to the potential customer's needs.

5. Handling objections: One of the most important stages of the sales process, which is usually underrated, is when the company becomes aware of possible concerns of the potential customer and addresses them. Knowing how to deal with this stage usually distinguishes good and bad company sellers. Figure 1 shows how companies can respond to different objections. For example, the company may be aware that the potential customer could make a contract with another company; as such, they could initially respond with a comparison of a competitor based on their requirements.

Figure 1: Flowchart to map out objections
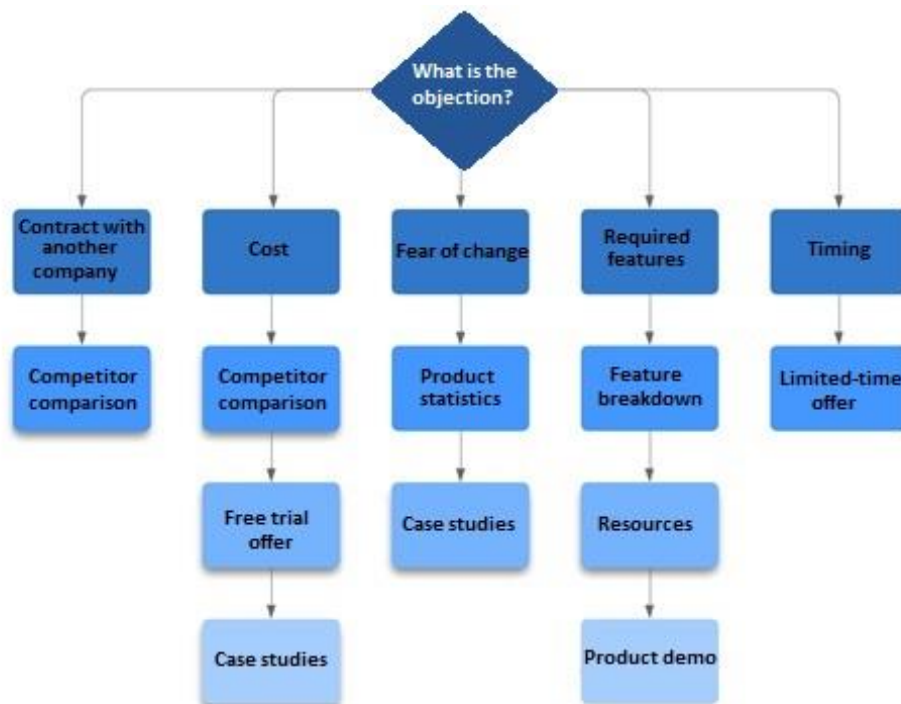
Source: Lucidchart (n.d.).

6. Closing: Closing is the stage where the company receives a decision from the potential customer.

7. Follow-up: After the company has sold a product or service, it is crucial to stay in contact with the customer. Therefore, this stage is relevant to retaining existing customers, which is well known to be cheaper than obtaining new customers. Maintaining customer relationships is key to success.

One of the two main aims of the sales process are acquiring new customers and maintaining existing ones. As such, during sales process planning, the company should set goals and action points as necessary to achieve the company's objectives. This planning includes forecasting sales developments, preparing resources, and minimizing weaknesses and possible dangers. For suitable planning, the management team should systematically identify sales options, which consequently enables better sales results. For sales planning, the process typically meets the following features (Snoj & Iršič, 2017):

– repetitive and intertwined with other processes in the company;
– boundaries between different stages in sales planning sales are usually not sharp or constant;
– it acquires coordination with other users;
– the results of different stages in sales planning must be unequivocal and written.

Recently, companies have focused on selling as much as possible without asking themselves to whom they are selling. To this day, some companies still focus on this strategy without knowing their customers (Dyche, 2005).

Companies who have learned their lessons know that products sell more easily and revenues materialize if they have more customers. It is well known that it is easier to sell to an existing customer than to gain a new one; therefore, companies try to improve their existing customer relationships. The best way to achieve this is to understand and know your customers, so it is easier to decide what method to use so that they will not choose the competition instead (Dyche, 2005).

The first task of a company should be to create customers. Nowadays, many companies are trying to keep their customers from going to their competitors because they are aware that gaining a new customer costs five times more than preventing old customers from leaving. To prevent customers from leaving, companies hence should aim to make it difficult for customers to find a satisfactory and comparable alternative (Kotler, 1996).

Marketing that consists of relationships with customers has five different varieties (Kotler, 1996):

– Basic: the company sells the product or service but does not make a contact again with the customer;
– Responsive: the company sells the product or service and encourages the customer to call or write to them if they need more information or have questions;
– Reliable: the company contacts the customer after they sell a product or service and get information on customer satisfaction;
– Proactive: the company occasionally contacts the customer and proposes other useful products or services;

– Partnership: company constantly works with a customer to find a way for the customer to be satisfied and successful.

Impact on sales process and important meaning on companies have also the information about customers.

Information is data presented in a specific form and having a meaning for the user. For a company and its management team, the most important management information can typically be divided into seven types: current information, status information, warning information, planning information, internal operative information, external information, and external distributed information. A piece of information does not necessarily belong just to one type but can be placed into several types (Damij & Indihar Štemberger, 1997).

Managing the company requires important primary information, which is information gathered for a specific challenge, as well as secondary information, which is pre-gathered and stored information, usually by an external source (Damij & Indihar Štemberger, 1997).

Collating information can be expensive and time-consuming, especially if spending time searching through irrelevant information. However, companies can make poor decisions if they lack suitable amounts of information. Nowadays, many companies are aware that information is equally important as many other resources, and they have to invest in systems to manage information if they want to compete with competitors in rapidly evolving environments (Palmer & Weaver, 1998).

2 CUSTOMER RELATIONSHIP MANAGEMENT

This section presents the concept of Customer Relationship Management, its history and evolution, the different types, their initiatives and advantages, and their disadvantages. I will also present obstacles and success factors in CRM implementation and a CRM strategy, which may help with the implementation of a CRM system to support the company's success. Overall the purpose of this section is to understand what CRM is and what impacts it can have on companies.

2.1 About Customer Relationship Management

Customer Relationship Management (hereafter referred to as CRM) is a business strategy, which aims to increase organizational profitability while building relationships with customers. If properly implemented, it can raise profits and support customer loyalty. It also allows organizations to receive more options for customer-centric strategies (Chakravorti, 2007).

CRM systems allow companies to manage all relationships with their existing and potential customers. The goal is to improve each customer's relationship and, therefore, increase the

company's profitability. By collecting information from customers from different sources, such as by phone, email, website, etc., companies can more easily manage their customers' needs and consequently build stronger relationships to gain customer loyalty (Kabi, n.d.).

The aim of CRM is to obtain a superior customer experience and sales. The goals are to increase customer retention, shorten the sales cycle, sell more, and decrease customer acquisition costs (Burns, 2017).

Companies try to grow long-term, deep relationships with their customers because it is cheaper to retain old customers than to acquire new ones. To achieve this, companies have to know as much information as possible about their customers. This information includes current and potential profitability, product and contact preferences, and past interactions (Chakravorti, 2007).

CRM can potentially change a customer's relationship with a company. The goal is to know your customers, automate business processes, save time, and negotiations. Companies must be aware of which customers they have to keep and which are better to lose; this means that the company should avoid focusing on lower-value customers, which could waste precious time. Customers have to be treated as individuals with different preferences (Dyche, 2005).

CRM allows companies to import all data into a single database, which the entire company can access. It combines company processes and allows the exchange of data, which has a high value also in digital marketing. This allows companies to target specific groups of customers based on their interests, purchases, and other behavioral patterns (Miklavcic, 2017).

The main aim of CRM systems is to provide the company with all of the necessary information about their potential and existing customers in one place. In cases whereby the company does not have well-sorted information, the result can be losses of valuable time searching documents and information, which is also quickly noticed by customers, impacting their trust and satisfaction (Habbe, 2016).

Some of the most significant areas of CRM are (Santos, 2019):

− Customer service: this includes the front office functions in a company, which are the first point of contact for customers.
− Campaign management: this represents a tailored approach to attract prospective customers.
− Salesforce automation: usually occurs as part of a CRM system providing automated workflows to manage leads and sales team performance. It automatically records all the stages in a sales process (Armour, 2021).

Different studies show that CRM has been conceptualized as (Chakravorti, 2007):

- Strategy: CRM as a strategy divides customers based on loyalty and profitability. Accordingly, we have to manage relationships and company resources. When talking about relationships, we have to keep in mind that the most important relationships are profitable; therefore, it is more crucial to ensure the right type of relationships rather than how to develop and maintain them.
- Technological tool: Relationship management was pushed to the forefront of marketing due to the advent of CRM technology. Nevertheless, the industry does not view customer relationship management as a special technological process. To successfully implement CRM strategies, the company needs CRM technology, databases, and management. Customer profitability is achieved with the help of system databases, analytical tools, marketing campaigns, and data mining.
- Process: When talking about processes, we have to understand the basic definition of business process, which is an activity or set of activities that can drive an organization to a specific goal.
  The processes can be categorized into macro or micro levels occurring at different organizational levels. CRM has been defined as both levels that include several sub-processes. This several sub-processes should include strategy development, value creation, multi-channel integration, information management, and performance assessments.
- Capability: The essence of capability view of CRM is the ability to adapt behavior toward satisfying individual customers continuously. Two of CRM's capabilities are market sensing and customer linking. Market sensing is where organizations can sense or predict events and trends before their competitors. Customer linking is creating and maintaining close customer relationships. Both capabilities reflect analytical, integration, operational, and learning capabilities.

2.2   Evolution of Customer Relationship Management

Although CRM is connected with the age of digitalization, its roots are much older and often date all the way back to the ancient world. Even in the early days of trading, merchants quickly understood that keeping track of what they sold to whom and when could gain different advantages. Over the years, CRM evolved until, in the 1980s, database marketing appeared, which helped companies gather information about what customers buy regularly and how much they are willing to spend. Later, in the 1990s, CRM began evolving into a two-way customer strategy that enhanced customer experiences and automated processes for the first time, which was only reserved for big, rich companies (Chakravorti, 2007).

One of the three reasons that relationship marketing became so popular was that companies realized that they needed to focus on retaining customers and lower acquisitions during the energy crisis, where competition intensified on a global basis. Another reason came in the form of service marketing, which allowed research regarding customer loyalty. To lower costs and improve quality, companies quickly began establishing key account management

processes to narrow down the number of suppliers. Information technology supported the implementation of marketing strategies, the ability to individualize offers, and enhance responsiveness between companies and customers. It enables the company to recognize and enhance its long-term relationship with customers. This process also supports database marketing and data mining, through which companies can make better decisions. However, companies should be aware that information technology assimilation is not always beneficial; an analysis of costs versus advantages must be made prior (Chakravorti, 2007).

As mentioned, a poor understanding of CRM could disable companies from achieving all of the expected benefits. Today, CRM is seen as a technological innovation that ensures higher customer satisfaction and profit margins. Technology has expanded the opportunities for companies to customize their offers as much as possible, based on the information they gather on their customers.

High promises from software vendors cause companies to expect a lot without taking into consideration that every company may have different needs. Therefore, in the beginning, CRM was often misunderstood and taken as a mere technological tool. When understanding that technology only forms a single component of CRM can it be used to its full potential on an organizational level (Chakravorti, 2007).

2.3 Types of Customer Relationship Management Tools

Each CRM software focuses on different, specific functions which are required to manage customer relationships. Many platforms integrate elements of various types of CRM, but they can be divided into three categories. Nevertheless, usually, CRM software does not belong only to one category but may use the functionalities of all three. These categories include (ORO Inc, 2020):

- Operational CRM: provides a complete view of all customers' communications in the company. With the possibility of generating leads, converting them into customers, and following their data through the entire sales process, it is designed to solve problems with customer relationships. One of the best benefits that operational CRM offers is sales and service automation, which allows the company to set standards and organize information. It also helps automate contacting companies' leads and customers, choosing the most effective channel. With contact management and lead scoring, it is easier to follow information and make decisions about which type of information or lead is more important (ORO Inc, 2020).
  Operational CRM is a good fit for companies that have linear sales processes (Fuchs, 2019). Linear sales processes are those with a predictable pattern. Usually, the sales follow through coordinated stages (Lowe, 2019).
- Analytical CRM: Its task is to collect, store, and organize data acquired through the sales process. The tool allows companies to make reports and implement analysis and

segmentations, etc., which can help companies prepare different sales strategies and more easily accept decisions. Storing data in a centralized location can provide statistical analysis to reveal the trends and purchasing patterns of a customer; therefore, companies can prepare a more individual customer approach. Besides tracking customer information, it also enables tracking of employee performance (ORO Inc, 2020).

Analytical CRM is perfect for companies who would like to get a picture of how their customers operate (Fuchs, 2019). Nevertheless, usually, CRM software does not completely belong only to just one type but can pose the functionalities of all three types. Companies can also use several types of CRM simultaneously (ORO Inc, 2020).

– Collaborative CRM: This category unites all of the company's sections related to customer service and handles all the tasks through automation. Its main features are interaction, channel, and document management (ORO Inc, 2020).

Collaborative CRM would best fit companies making business at multiple physical locations. Companies that do not want to spread their information throughout the entire organization should avoid this type and choose another, instead (Fuchs, 2019).

2.4 Advantages and disadvantages of Customer Relationship Management system

Usually, when companies decide to implement a CRM system, the well-known advantages overweigh the disadvantages. Companies that do not understand the meaning of CRM and have a lack of information can cause a waste of time and enormous costs (Thakral, 2021):

Advantages:

– more effective sales and marketing;
– faster sales conversion process;
– increases productivity and lowers time costs;
– collaborative teamwork;
– can improve customer loyalty.

Disadvantages:

– too much reliance on CRM can diminish customer loyalty;
– security concerns regarding the data;
– time and cost of implementation;
– requires a process-driven sales organization;
– does not suit every business.

Benefits of CRM described by Drapkin (2022) are:

– easy scaling with business growth,

- scaling employees,
- increasing companies efficiency,
- saving costs on data reports,
- improving customer retention,
- security assurance.

As one of the disadvantages Drapkin (2022) mentioned the possibility of overspending on CRM, possible additional costs for customer support and costs connected to different customizations.

2.5   Customer Relationship Management Strategy

Setting up a CRM strategy may help companies make more of their platform. When setting up a strategy, it is recommended to find the deficiencies and chose a CRM which will address them. It is important that the sales team and management have the same clear goal so that the CRM implementations can be successful. If certain factors are not defined well, such as what stages the company will use and how they define leads, the company can face problems such as losing leads, contradicting goals between sales users, and doubled workloads (Burns, 2017).

Having a CRM system is not enough for companies to be successful. To manage relationships, companies also have to define their CRM strategy, which should be based on Chalmeta (2006):

- Identifying customers: get to know who the customers are and focus only on those whose behavior can be influenced;
- Analyzing the profitability of customers: includes structuring customer types into different segments, assigning costs to different segments, and analyzing customer value;
- Defining customer objectives: involves defining the company's profitability and objectives for the customer.

The five key processes usually involved in a CRM strategy are (Lovelock & Wirtz, 2022):

- Strategy development: involves the evaluation of business strategy and analysis of industry trends and competition. This should be the responsibility of the management.
- Value creation: creating value makes several benefits for the company, such as lowering costs and supporting the customers who need to participate in CRM by providing their information. Through the provided information, companies can create a more specific approach to achieve customer needs, and they do not have to get the basic information from customers all over again since it is already saved in a CRM system.
- Multi-channel integration: ensures that customers can get a customized and personalized approach through different channels.

- Information management: all gathered data have to be provided as relevant information and should be available to the users. This process includes a data depository, information technology, and front and back-office applications supporting contact activities with customers.
- Performance assessment: companies should check if the CRM was the right decision and whether it brings the promised benefits.

2.6   Customer Relationship Marketing Initiatives

When talking about CRM initiatives and tactics, let's first consider a definition of customers' satisfaction and loyalty.

The satisfaction of a customer is the gap between what the customer expects and what the customer really gets. A service or product that does not meet the customer's requirements and expectations may disappoint them. The bigger the gap, the bigger their disappointment (Beckwith, 2003).

Satisfaction of a customer can also be described as a personal feeling which occurs between customer expectations and opinions after the purchase. Here, the two extreme endpoints are disappointment and excitement at opposite ends of the scale. Companies often recognize the satisfaction of customers with the quality of their product or service but forget that customer satisfaction is vital in all phases of communication with customers (Habbe, 2016).

Customer satisfaction is the result of customers' positive or negative feelings, based on their experience of measuring a product or service (UKEssays, 2015). Loyalty of customer can be viewed as their behavior and willingness to buy the same products or service time after time. Loyalty is built on customer satisfaction; therefore, satisfied customers remain loyal longer, make more purchases, are good referrals, and give less attention to competitors (UKEssays, 2015).

When thinking about using CRM, companies usually have a vision of what they want to achieve with it and with what tactics are they going to increase customer loyalty. The most known tactics are explained by Dyche (2005):

- Cross-selling and up-selling: the action of selling an additional product or service to an existing customer. It is about understanding which product or service will increase the customer's profitability. Overall, cross-selling means selling the right product to the right customer.
- Customer retention: the company's ability to keep existing customers and prevent them from switching to a competitor. It is well known that retention is a lot cheaper than customer acquisition. Companies that focused on customers that had left forget about the existing customers who might not have left next if they'd been given the time. The

problem with the retention strategy is that when companies identify those customers who might go to competition, they may be unsure of how to prevent them from doing this.

- Behavior prediction: predicting customers' behaviors allows companies to determine the next steps for customers. This can be done with data mining techniques and several analysis methods, which are:
  - Propensity-to-buy analysis**: understanding what a particular customer is likely to buy;
  - Next sequential purchase: a prediction of what a customer is likely to buy next;
  - Product affinity analysis: understanding which products will be purchased together;
  - Price elasticity modeling and dynamic pricing: determining the optimal price for a product, often for specific customer or segment.

Therefore, with knowing what a customer is likely to do, companies can make different marketing decisions such as the following (Dyche, 2005):

- offer discounts to existing customers who might go to the competition;
- target campaigns to specific customers and segments;
- package some of the products together and fixed-price them;
- cross-sell products that are likely to be purchased with other products.

The main goal of all this analysis is to gather knowledge about the company's best customers.

- Customer profitability and value modeling: Different companies have different value metrics, but many have formalized the practice of value modeling. This allows companies to score a customer based on relative worth to the company over time. Based on the final score, different types of communications are then used to contact an individual customer. Companies have to be aware that scoring customers only on one metric can even decrease a customer's satisfaction.
- Channel Optimization: Optimizing the company's input channels with its output of customer interaction, leading to the best approach for each customer.
  The goal is to offer the right message to individual customers at the right time.
- Personalization: Customizing communication with a customer based on their preferences and behaviors. Different personalization tools can tailor messages to individual customers by accessing their current personal data each time the customer visits the website.
- Event-Based Marketing: A form of automated marketing that identifies the key events in the customer's lifecycle and reacts with specific communications. The goal is to react to customer events as soon as possible. This requires solid process automation and good workflow to achieve real effectiveness.

2.7 Obstacles and Success Factors

CRM offers a wide spectrum of applications which can be modified to fit for different organizations needs. With various marketing materials integrated into a CRM solution different type of companies can benefit from it, such from freelancers, small companies to big organizations. Before implementation it is critical that companies analyse their sales process and operations so they can choose the right CRM solution which would match their needs. It is advised to implement and start using CRM before it becomes necessary, because companies can increase customer retention with (Kulpa, 2017):

− Learning: companies can learn about their customers, through searching their history purchases and therefore prepare more individualized offers, which meet their needs.
− Organization: CRM automate marketing campaigns, business analytics and customer data which allows companies to organize and easier understand their data.
− Optimization: CRM enables companies to optimize interactions with their customers and therefore boost customer satisfaction.

Before implementing CRM, companies should explore other companies' experiences and obstacles, so they can learn from them. Research by Adrian Payne and Pennie Frow (2013) showed that problems associated with internal attitudes and organizational structure were the main obstacles. These factors include the lack of skills and inadequate investment; however, some companies overcome this problem by achieving fast wins, which lead to improvements where they were able to demonstrate progress and returns. In this process, it is crucial to have good data; companies that underestimate the data cleaning and duplicate information are usually surprised with fewer achievements, which are consequences of poor data quality and quantity. Research found that other important points include a failure to understand the business benefits, lack of leadership, and inadequate measurement systems, where the problem usually falls to the company for not establishing clear goals or explaining them well to their employees (Payne & Frow, 2013).

Because of the wide variety of tools offered by different vendors, often sold as CRM solutions, and the lack of information and clear definitions, CRM is usually misunderstood (Payne & Frow, 2013). Managing a successful CRM implementation requires an integrated approach to technology, processes, and people (Injazz & Popovich, 2003).

We know that two important factors when discussing successful implementations of CRM are technology and business process changes. However, many companies are not aware that people are also an equally important factor. Successful implementation requires commitment from the management team, with clear goals in CRM initiatives, strategies, vision, and instructions. As with most changes in companies, not only in technological directions but also others, it is expected to face disapproval which requires the full attention of a management team member. It is important to create a customer-oriented culture and build

an environment that encourages the sales team to collaborate rather than to compete (Injazz & Popovich, 2003).

Research by Frederick Reichhold and Earl Sasser of the Harvard Business School shows that most customers are only profitable in the second year that they do business with a company. Gaining new customers is more expensive due to costs spent on marketing, costs of gaining information, and losing precious time. CRM turned out to be a great strategy and a tool when ensuring customer loyalty (Anderson & Kerr, 2002).

Companies implementing the CRM system but not reaping the promised results may be because they did not understand the concept of CRM well and started choosing the technology first before setting their CRM strategy. As such, companies should have a clear vision of their goals, purpose, and approach for creating and maintaining a stable customer relationships (Anderson & Kerr, 2002).

Usually, the main reason of companies for implementing CRM is to get more leads and customers, increase their satisfaction and therefore make higher profits. To avoid struggles and achieve a successful CRM implementation which will provide promised benefits it is suggested to follow CRM process, which consists of the following steps (Repin, 2020):

1. Defining a strategy
Companies should set the goals they would like to achieve with a CRM, discuss the business areas and processes they would like to cover. It is also critical that companies are aware that a big change do not happen through the night, as massive digital transformation and data transfer takes some time.

2. Mapping out the implementation plan
As implementation takes some time it is advised to divide the CRM project on several stages with clearly set timeline. A general outline of project phases of CRM should be:
 − CRM consulting: it is analysis of existing business processes and needs to define the best CRM that would cover these.
 − Data cleansing: it covers data cleaning and migration from current system into a CRM solution.
 − Customization and custom development: it is including automated workflows, custom reports, dashboards, different applications etc.
 − Testing: phase where companies should check if all functionalities work according to desired needs and requirements.
 − Deployment: taking a CRM solution into production environment.
 − User training: it is critical to train the users and clearly set the ules of using the CRM
 − Post-implementation support: after the roll-out the work is not yet done, due to is important to track changing companies needs and as well checking system issues.

3. Assess risks
It is hard to predict all implementation obstacles, but companies should consider at least the most common ones which are:

- time and budget: it can quickly happen that companies go beyond their set time and budget if they do not stick to the first set plan
- CRM that users avoid: if the CRM is inconvenient for the users, they won't use it often and in its all functionality.
- steep learning curve: for users t is difficult to learn all functionalities that CRM offers in one time, therefore it is critical to involve the users in the implementation process, offer them training and set an CRM admin, to whom users can contact in case of questions and technical problems.

CRM implementation success largely depends on support of top management which main task is to have a clear vision and establish a customer-orientated culture, as it is well known that people usually resist changes. It is crucial that top management is aware that CRM is a business strategy to which they must be committed. Company must set organizational objectives that can be measurable. One of the best practices that top management should consider are (Doshi, n.d.):

- knowing CRM projects from identifying goals to defining supporting business processes,
- offering governance for CRM projects in a way of recognizing the nature of sales interactions,
- establishing a customer-oriented culture through the company,
- ensuring integration with current systems applications,
- asking for technical advice from experts and as well others who already successfully implemented CRM,
- reviewing, updating, and implementing new rules through the company,
- implementing a system that is scalable,
- identifying most profitable customers and links to business performance.

It is important for a sales team to be acquainted with a sales process that is well defined by a top management. They need a tool to track their progress and help them cover their work as well their customer needs (Rogers, n.d.).

The CRM implementation rate of failure is 55%, according to the Gartner Group. The reason for this is that companies usually forget that the CRM system is just a tool that helps them improve the relationship with their customers; it is not a set CRM strategy. Reasons for CRM failures usually include (Lovelock & Wirtz, 2022):

- viewing CRM as a technology: companies can quickly get misled by all of the features that CRM offers and, therefore, leave the leading part to the IT departments, rather than focusing on the strategy and their customers.

- a lack of customer focus: companies may forget about their main goal of improving customer service.
- insufficient appreciation of customer lifetime value;

- failing to re-engineer the business process: when implementing a CRM, many companies stick to existing processes that should be redesigned for a CRM implementation.
- underestimating the challenges in data integration: customer information should be available to all in the company at any one time.
- inadequate support from the top management: without the management team's full support and guidance, the CRM is usually sentenced to fail.

CRM success factors, which are shared between companies that have great results from it, include (Anderson & Kerr, 2002):

- strong internal partnerships around the CRM strategy: company success is related to all areas in the organization; therefore, CRM processes should also be formed from strong internal partnerships, knowing the needs of each area.
- employees from all levels collecting the information for CRM: all employees should contribute to collecting of information, where every employee should know the purpose of doing so and what information is being collected through this process.
- customer and employee friendly CRM tool: CRM should be integrated in a way that should feel like a natural part of customer service interaction.
- reporting only the data a company uses: CRM offers to run almost any report one could imagine – however, in order to keep the focus on a determined CRM strategy, the company should focus only on those reports that are necessary for their strategy.
- using low-technology instead of high-technology: companies should implement simple CRM solutions that cover their needs. Simple solutions that are actually used by employees can be substantially more valuable that a high-tech solution, which could possibly be overly complicated, expensive, and may not be used often in the end.

One of the biggest challenges relating to CRM, concerning management, is having too much data, with which the business is unsure of how to transform this into valuable information (Anderson & Kerr, 2002).

Collecting of information should occur at various points in the customer's life cycle, including (Anderson & Kerr, 2002):

- Before the company have customers: at this stage, companies should determine their target markets by using demographic and psychographic information.
- Initial contact with a prospect: it's not necessarily a crucial requirement for someone becoming a customer to buy something outright. Companies should take advantage of an opportunity and get information from them, such as how they heard about the company, their first impressions, what they would expect in an offer, where they might buy this product or service, and so on.
- Early in the relationship: when the customer makes their first purchase, the company can start gathering more specific information about this individual customer.

- Later in the relationship: every company should know which customers are their best or most loyal. From them, the company can gather information about the industry, products trends, the competition, and similar.
- At a pause in the relationship: it's natural that companies also face customers who become less active with time. Nevertheless, companies should understand that these kinds of customers are still important as a source of referrals.
- At the end of the relationship: once the customer stops purchasing from a company, this is an important source of information about how the company could improve its services.

3 CLOUD COMPUTING

This section presents the history of cloud computing, the definition and concept of cloud computing, the types of cloud service models, and cloud service deployment models.

3.1 History of The Clouds

Since Salesforce is one of the leading CRM platforms based on cloud computing, it is first necessary to understand the basic logic behind it. The start of cloud computing began with virtualization and network efficiency technologies. The breaking point was when the virtualization also spread onto disk storage units and network systems.

The main technological foundation for cloud computing was global accessibility to a network at affordable prices, on which were developed architectures, such as Client-Server, which spread the integration of remote services in an environment for data processing. The next step was designing server clusters, which connected a large number of discrete servers into an intertwined whole, portrayed as a single, powerful computer. Furthering on from this, in 1990, the concept of so-called Grid computing was first presented; this technology was devoted to the efficient use of inactive computers around the world. They prepared the sources, which users could measure based on their specific and calculated service requirements. It also successfully solved the problem of data residency. With the later appearance of service computing, we can see first connections with today's concept of clouds, where the service is ordered and paid for by consumption. One of the main principles behind cloud computing was also service-oriented architecture (SOA), which allowed network-based pre-order of applications. The emergence of new mobile electronical devices such as laptops, thin clients, and smartphones also caused a change in thinking regarding the possibilities for accessing data processing services. The needed connection for all the data requirements successfully addressed dislocated network-based services, such as cloud computing (Höllwarth, 2012).

3.2   About Cloud Computing

Cloud computing is a model which enables on-demand network access to different computing resources such as servers, storage, applications, services, etc. It consists of five critical characteristics: on-demand self-service, broad network access, resource pooling, rapid elasticity, and measured service. It also consists of three further service models and four deployment models, as described in the beginning of next section (Mell & Grance, 2011).

Cloud computing offers services such as storing, managing, processing, and accessing data, which is available through the cloud network instead of a local server or computer hardware. Instead of using traditional methods for data storage, cloud computing ensures companies can access their data anytime and from anywhere, which is faster, more cost-effective, and automated. There are many reasons why platforms based on cloud computing are usually beneficial, such as (JavaTpoint, n.d.a):

- Cost-effectiveness: due to there being no local drives or computer hardware;
- 24/7 availability: all services and data are available at anytime, anywhere;
- High security: data stored in the cloud is very secure compared to data stored on hard drives, which can be lost far more easily;
- Easy access: internet-stored data is available anytime and anywhere and can also be shared with other users;
- Fast implementation: implementation of platforms based on the cloud is usually faster since users only need to sign-up;
- Instant scalability: companies can easily manage the number of users on the platform with no worries about running out of capacity;
- Automated updates: platforms based on the cloud have automated updates software;
- Collaboration: thanks to the possibility of sharing data with other users, it's possible to improve collaboration and consequently also improve customer service.

Since there are more and more cloud services published on the worldwide service pool, it's crucial to consider that a series of multiple services work with collaboratively to cover the user's needs. Therefore, it is suggested to integrate the service composition (SC) system in cloud computing, but problems can occur when deciding which simple services should be selected (Jula, Sundararajan & Othman, 2014).

3.3   Types of Service Models

Cloud computing offers a range of different services, stored in different remote locations. Each service facilitates the path of information from the end-user to the cloud service system, where the main difference between services is what they provide. Basically, these services generally can be (RedHat, 2018):

- SaaS (Software as a Service): Software as a Service provides a software application to users over the internet without needing an application locally installed. This makes access substantially easier. All maintenance and software updates are made by cloud providers. Typically such applications are usually web or mobile applications, which is also true for Salesforce.
- PaaS (Platform as a Service): Platform as a Service offers an on-demand platform for software applications, which users can develop, test, and manage. Primarily, it is intended for programmers and developers because it enables faster and easier development of applications without worrying about managing the database, server, and storage.
- IaaS (Infrastructure as a Service): Infrastructure as a Service is one of the simplest services, which offers users the chance to rent an existing infrastructure, such as network or data storage. Users have the ability to operate the system and applications without worrying about maintenance, networking, data storage, and so on.

Figure 2 shows the different types of service models, where green-marked fields show what companies can manage, and red fields demonstrate what is managed by service providers.

Figure 2: Types of service models
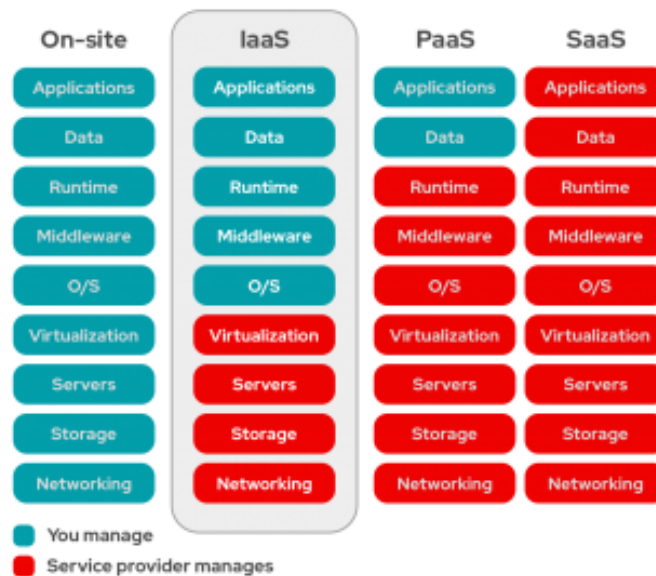
Source: RedHat (2018).

3.4   Types of Cloud Computing or Deployment Models

Every type of cloud service enables cloud computing and shares resources across the network, and relies on mixed technology, which usually includes the operating system, management platform, and application programming interfaces. One of the most basic

differences between cloud systems is their location and ownership. Therefore we know that there are three main types of cloud systems (RedHat, 2018).

- Public clouds: Public clouds provide IT services through the Internet, and where the cloud provider is responsible for managing and maintaining resources shared between users over the network. This type of cloud system offers flexibility, scalability, and is usually free to use or only requires very minimal charges. They are most suitable for predictable computing needs, applications, and services for IT operations, software developments, and test environments. Thus, public clouds require no investments for the deployment and maintenance of IT infrastructure and flexible pricing options; however, they may be less secure. With a lack of security and minimal technical control, companies have to decide between the cost on one side and vulnerabilities on the other side (Raza, 2020).
- Private clouds: Private clouds are intended only for one private company, where cloud computing resources are isolated and delivered through a secure private network. It enables the companies to customize their needs and security; these systems are, therefore, most suitable for highly regulated companies which poses sensitive data. The benefits of private clouds are exclusive environments, custom security, flexibility, and scalability; however, on the other hand, their limits are connected to mobile difficulty and the price, which may be substantially more expensive (Raza, 2020).
- Hybrid clouds: Hybrid clouds include features from both public and private cloud solutions. In this type of cloud system, applications and data share resources between a public and private cloud, based on the company's unique policies around security, scalability, cost, and efficiency. Hybrid clouds offer policy-driven options, scale with security, reliability, and cost control, and are most suitable for the following companies, as defined by Raza (2020):
  - those facing different IT requirements in the fields of security, regulatory or performance;
  - those looking to optimize cloud investments;
  - those looking to enhance security on existing cloud solutions, such as Software as a Service solutions.

4   SALESFORCE

This section introduces Salesforce, including information on its concept, the development of the company, its services and products, the Salesforce architecture, and the software's advantages and disadvantages.

4.1   About Salesforce

Salesforce is a Customer Relationship Management platform that is based on a cloud system with standalone applications for sales, customer service, and marketing. Its purpose is to store customer data, generate more leads, produce new sales opportunities, and enable a deeper understating of individual customers (Thompson, n.d.).

The journey of Salesforce began in 1999 with the idea of being to create a world-class internet company for sales force automation. The leader of this idea was Marc Benioff, who co-founded the company with Parker Harris, Dave Moellenhoff, and Frank Dominguez. Besides developing their prototype, they also built a distinctive startup culture. By the end of the company's establishment year, it had already grown its team to 40 employees following the written strategic plan named V2MOM, which included visions, values, methods, obstacles, and measures to ensure all employees were following the same common goals (Salesforce.com, n.d.b).

When Salesforce launched, the first challenge was to gain the trust of companies to store their valuable customer data. Therefore, Salesforce had to convince companies to use the browser as a CRM interface while also reassuring them that their data was safe from intrusion (Rounseville, 2020).

Over the next several years, the company became the fastest growing CRM company, with more than 5.740 customers and 70,000 users accessing their service in 107 countries and with 8 different languages. Following its increase in global presence, the company also launched Service Cloud, Chatter, Trailhead, Einstein, and the like and rapidly became the world's leading CRM platform (Salesforce.com, n.d.b).

Today, the company is headquartered in San Francisco, California, with more than 56,000 employees and a revenue of 21.25 billion dollars (Wikipedia, n.d.).

Salesforce provides numerous different editions with several different features and functionalities that companies can use. One such version is the Lightning experience (Salesforce.com, 2022), enabling more features than Salesforce Classic. One of the biggest benefits is that it offers news and performance charts on the home page, expanded forecasting, an activity timeline, a modern interface, updates, and much more (Paul, 2021).

Another option is Salesforce Sandbox, which is the copy-based environment of the data of production environment of the company. It is often used for testing before implementing new fields and updates or for training new users, as there can be no harm made to real data (KeyNode, 2019).

Salesforce, in its full functionality, is also available on mobile phones through the Salesforce mobile app (McCarthy, 2021b). It runs on Android and iOS devices, and the mobile app's security systems can be categorized into two groups: those that control access and security

of the Salesforce app, such as permission sets, passcode, login IP ranges, etc., and those that control what the user can see and do inside the app (McCarthy, 2021a).

Salesforce enables the management team to track activities, making it easier to accept strategies and decisions through the data displayed through the Reports and Dashboards; this is one of the unique selling points of Salesforce (Mohanan, 2020). Report tools enable customizable real-time reports and analytics, through which companies can save time and money (Wilson, 2021). They basically provide a list of information displayed in rows and columns that can be filtered, grouped, and displayed by users' demands (Salesforce.com, n.d.a).

Dashboards show information from reports graphically, called dashboard components, and can be divided into five types: charts, gauges, tables, metrics, and the visual force page. This allows users to create a custom component type to present information in an individualized way (Goodey, 2013).

As a security feature, Salesforce enables companies to specify and limit the access of specific information to only selected users (Gessner, n.d.).

4.2 Salesforce Services and Products

With a different range of services and products, Salesforce fits the differing needs of any company. Their most known cloud services and products are (JavaTpoint, n.d.c):

− Sales Cloud**:** Sales Cloud is an integral part of the Salesforce CRM platform, helping companies provide marketing customer support. The platform is provided as Software as Service for browser-based access and as a mobile application. It includes the Salesforce automation tool, which improves the speed of the sales process, processes greater numbers of matters in reduced times, collaborates with customers, and successfully closes deals.
− Service Cloud**:** Service Cloud is the platform for providing support to customers through personalized services such as by telephone, email, or across other platforms.
− Collaboration Cloud**:** Collaboration Cloud includes a service called Chatter, which enables users to collaborate with others. The tool integrates a "follow" system and the ability to share specific information. Users have permission to create groups and profiles where they can share the information with others they choose.
− Custom Cloud**:** Based on PaaS (Platform as a Service), this custom cloud allows users to develop an application based on the desires and needs of a customer. The development of new applications takes place through the Force.com platform, which means lower costs, faster development, and higher quality results than developing through traditional device platforms.

- Marketing Cloud: Marketing Cloud covers marketing automation and customer engagement. This enables users to send emails to various customers, prepare marketing analyses, and much more.
- Analytics Cloud: Analytics Cloud is a business intelligence platform that enables working with graphs, charts, and other graphical presentations to work with large volumes of data easily.
- Commerce Cloud: Commerce Cloud is a cloud-based platform that empowers companies to create intelligent experiences and services across all channels, including web, mobile, social media, and so on.
- App Cloud: Through the Salesforce App Cloud platform, users can build custom apps that can run on the Salesforce platform. It offers different tools, such as Force.com, Salesforce Thunder, Salesforce Sandbox, and more, through which applications can be built and discovered more easily.
- Community Cloud: This platform's purpose is to maintain communication between users and customers. With sharing information in real-time and a more personalized experience, it allows users to enhance success and increase productivity.
- IoT Cloud: The so-called Internet of Things (IoT) can generate a large volume of data through different devices and applications.

4.3   Architecture of Salesforce

All Salesforce services, products, and platforms run thanks to the behind multilayer architecture, where each layer of architecture has different functionalities. In core Salesforce, the architecture consists of three different layers (JavaTpoint, n.d.b):

- **Multi-Tenant layer:** The Multitenant layer consists of one common application that takes care of multiple customers. Different customers use the same server, but their data is safe and isolated from other customers (or, in this case, users). Regardless, all data is stored in a single database. This means lower costs and easier sharing with other users. In Figure 3, the concept of the multi-tenant layer is presented, where different customers use the same server.
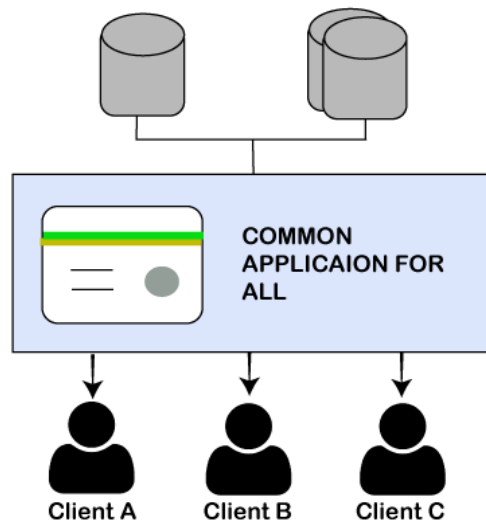
– **Metadata:** The Salesforce platform is based on a meta-data development model, which means that it stores metadata along with other data. Figure 4 shows the architecture of metadata, where the tenant-specific data ensures data is shared with only one tenant and other tenants have no access to this data. Information is secured because data is stored on different levels, in the form of data above data.

Figure 4: Metadata architecture
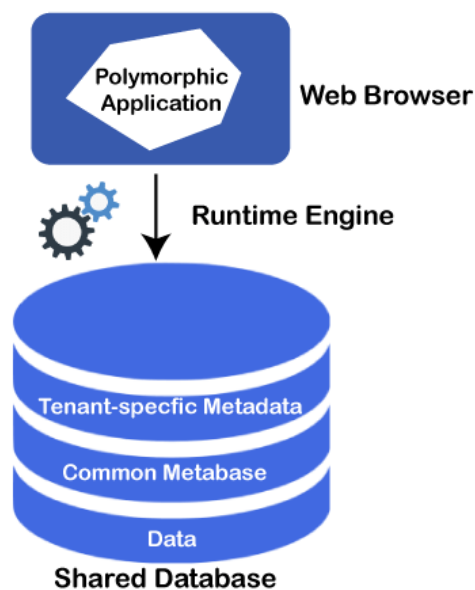
- **API Services:** API provides an open method of programmable access to data of any application running on the Salesforce platform. This model allows developers to customize applications and connect with others.

4.4 Review of Salesforce's Advantages and Disadvantages

Salesforce is known as one of the leading products on the CRM market; as such, companies must be aware of whether it is the best fit for their needs and business. Only with a comprehensive review can companies benefit fully from Salesforce implementation services.

One of the critical points that companies have to consider is cloud deployment. Because Salesforce is based on the cloud, it needs less IT infrastructure, which means reduced costs; moreover, it is available from anywhere and at any time. However, because of this structure, companies need a good internet connection to use Salesforce. In the event of failure and system upgrades, users cannot use it.

Salesforce also offers various products for different needs and provides an option for customized applications, but this usually means additional costs for optimization. With the necessary functionality to support every stage of the sales process, Salesforce supports complex business operations with automated workflows, but every available edition also has its limitations. For example, these include limited created custom fields, file sharing, and so on, which is reflected in data storage limits; therefore, companies usually have to consider buying additional systems from other vendors. As Salesforce offers customization for applications, it also offers it for capabilities, which means creating special objects, fields, templates, and more; however, with too many customization options, companies quickly complicate basic features and confuse users. This can lead to lower CRM adoption and less employee productivity as well as motivation. Another point to consider is integration capabilities. Salesforce can be integrated with several external systems such as ERP, eCommerce platforms, social media, etc. This enables multiple data exchanges and aligned workflows, but sometimes, this may not be enough due to some limitations.

Regarding the price, Salesforce offers a scalable model, where fees depend on the number of licensed users and are paid annually; nevertheless, the price is set per user per month. The cost also depends on different customizations. One of the advantages is that Salesforce provides a self-service within their Trailblazer Community, where customers can share their experiences and help each other with technical difficulties. Through Trailhead, Salesforce also offers online training, resources, and release notes to keep their users updated. But, based on several user reports, many questions posted on Trailblazer often remain unanswered, and Salesforce live support is not easily accessible, which may lead companies to search for external help and thus cause additional costs (Karatkevich, 2019).

Several well-known advantages are summarized as follows (University Canada West, n.d.):

- easy to use and incorporate;
- it can be integrated with other apps such as Gmail, Outlook, etc.;
- it can be customized for companies' different needs.

Table 1 gathers points to be considered with their advantages and disadvantages.

The holistic view of each customer that Salesforce offers shortens the time the companies need to resolve customer challenges. Users can spend less time entering data and put more focus on building connections with customers (Farrar, 2021).

Table 1: Points to consider

Points to Consider	Advantages	Disadvantages
Cloud deployment	– Fewer IT resources – Reduced costs – Available anywhere and at any time	– Internet connection
Products for business needs	– Building own app	– Additional costs
Extensive functionality	– Automated workflows – Supports all stages of the sales process	– System limitations – Data storage limit
Customization capabilities	– Customizing solutions	– Quickly over-customize the solution
Integration capabilities	– Integration with external systems	– Technical limitations
Pricing model	– Scalable price model	– Higher costs in comparison with other CRMs – Additional costs with customization
Customer service	– Trailblazer community – Trailhead	– Unanswered questions – Poor live support
UI peculiarities	– User-friendly page layouts	– Load time of pages may be slower due to Java Script

Source: Karatkevich (2019).

5   SALESFORCE IN THE SALES PROCESS OF YASKAWA SLOVENIJA

This section presents the company and its sales process in connection with Salesforce. With the presentation of challenges and analysis of the sales process, I have made suggestions and improvements, and then conducted interviews with employees.

I have upgraded this section with my own cognitions and use deductive conclusions when comparing practices from professional literature to the company's specific situation. I also used the empirical part, where I analyze the situation of the sales process, gather information,

and examine all internal documentation tied to the Salesforce tool in order to make interviews with employees so that I could make improvements and suggestions.

5.1   Presentation of the Company

Before I can present Yaskawa Slovenija, for which improving the sales process with Salesforce is our main research subject, it is important to understand the bigger picture behind this company, its headquarters, and its subsidiaries.

Starting globally from the beginning, the first brand, Yaskawa Electric, was established in 1915 in Kitakyushu, Japan. The company's name originated from the owner's surname, Yasukawa, and changed from motor manufacturing to an automation company and finally to a mechatronics company (Yaskawa Electric Corporation, n.d.).

Now, the company is well known for its robotics and is already represented in 29 locations worldwide, with more than 15,300 employees. It has also sold more than 500,000 robots (Yaskawa America, n.d.).

Some of the key turning points in this company's history, where I also include points regarding the European and Slovenian markets, are presented below in the history timeline (Yaskawa Electric Corporation, n.d.):

− 1915: establishment of Yaskawa Electric in Kurosaki, Kitakyushu City
− 1917: delivered the first order, which was a "three-phase induction motor, 20HP".
− 1935: delivered the synchronous motor, a 4,000 HP, 250 rpm motor for rolling machines
− 1948: signed the first export contract after the Second World War
− 1950: developed a VS motor with variable speeds and remote control
− 1958: invented the Minertia motor, which presented the prototypic figure of servomotor Yaskawa's key component
− 1960: motion control technology became more advanced, while its commercialized automatic equipment became the basis for its robotic business
− 1977: completed the robot Motoman-L10 with the first fully-electric system in Japan
− 1979: established as Yaskawa Europe GmbH in Eschborn
− 1990: established Iskra Robotec in Slovenia
− 1992: started selling AC servo drives
− 1996: established Ristro in Slovenia
− 2003: Mechatrolink was networked
− 2009: developed the QMET motor drive system
− 2012: Yaskawa advanced into the field of robotics and human assistance in cooperation with medical institutions. During this time, it also developed so-called SDA, dual-arm robots
− 2015: commemorated its 100th anniversary

- 2017: proposed a solution concept, i3- Mechatronics
- 2019: Yaskawa Europe Robotics in Kočevje began production of industrial robots for the European market

That is a brief summary of the parent company's history, which is situated in Japan. Now, this section can also focus more on the European market, which is connected to the business of Yaskawa Slovenija.

The Yaskawa Europe GmbH company's headquarters in Europe are based in Eschborn, Germany, established in 1979. The company offers mechatronics and robotics solutions throughout Europe, the Middle East, and Africa. It has 1,980 employees in Europe, 9 manufacturing locations, and 23 business entities. The company's main segments are Drive Motion Controls, Robotics, and Environmental Energy (The Switch). This research will focus more on the robotic segment which is also represented in Slovenia by the subsidiary, Yaskawa Slovenija (Yaskawa Europe GmbH, n.d.).

The journey of Yaskawa in Slovenia started in 1990, when Iskra Robotec, as a mixed company of Motoman Robotec GmbH and Iskra d.d., started offering robotic solutions in the former Yugoslavian market. In 1996, Yaskawa decided to start an engineering operation in Ribnica, the goal being to provide solutions and integrate Yaskawa robots. Therefore, it established the company, Ristro. In 2010, Ristro was renamed Yaskawa Ristro, and in 2012, Iskra Robotec was renamed as Yaskawa Slovenija.

In Slovenia, three companies are present: Yaskawa Slovenija, Yaskawa Ristro, and Yaskawa Europe Robotics. Yaskawa Slovenija, with nine employees, is responsible for sales in Slovenia and countries of the former Yugoslavia. Yaskawa Ristro, with approximately two hundred and forty employees, is responsible for the design and production of robotic cells and applications meeting the needs of all subsidiaries in Europe. With thirty years of experience in the Slovenian market, countries of former Yugoslavia, and all over Europe, the firm has a wide range of implemented solutions in various fields of automation. That is also why Yaskawa Electric Corporation in Japan entrusted them with the design of the first robot factory in Europe, called Yaskawa Europe Robotics, located in Kočevje. Production commenced with the plan of manufacturing 5,000 robots and reaching an approximately 50 Mio EUR yearly turnover by 2022. The planned maximum production capacity is up to 10,000 robots per year.

Yaskawa, with a constant implementation of new technologies, solar and well-balanced energy-saving technologies, is putting lots of effort into establishing a clean and sustainable future (Jereb, 2021).

**5.2	Sales process in Yaskawa Slovenija**

Salesforce in Yaskawa Slovenija was first implemented in 2013, and in 2021, the company moved from Salesforce Classic to Salesforce Lightning.

Yaskawa Slovenija has nine employees, all of whom have licenses to use Salesforce. Based on the user's job title and functions, everyone is assigned a specific profile and role in Salesforce, which gives permissions based on what a specific user can see and do. Table 2 shows profiles in Salesforce in Yaskawa Slovenija, divided into four profiles: Y-Management, Y-Manager Sales R, Y-Power User, and Y-Sales R. From the table, it is also visible how many employees are assigned to a specific profile.

As the name indicates, profile "Y-Management" is intended for EMEA management. In Yaskawa Slovenija's case, this is for a director. Persons in this profile have permission to see and do everything. Profile "Y-Manager Sales R" includes the Sales Manager, which usually has the same permissions as the Y-Management profile. The "Y-Power User" profile includes one person from every EMEA company responsible for everything working smoothly in Salesforce and making changes, collecting ideas, preparing data, and offering to help other users. The Power User usually has the same access to tasks as persons in Y-Management. Finally, the Y-Sales R profile includes persons such as sales engineers and sales assistants who need Salesforce to enter data and search for relevant information.

Table 2: Profiles in Salesforce in Yaskawa Slovenija

Profile	Number of Users	Type of User
Y-Management	1	Director
Y-Manager Sales R	1	Sales Manager
Y-Power User	1	Sales Engineer
Y-Sales R	6	4x Sales Engineers, 2x Sales Assistants

Source: Own work.

Every user also belongs to an assigned Role. In Yaskawa Slovenija, all users belong to the role of "YSL," which means all users from Yaskawa Slovenija.

The sales process in Yaskawa Slovenija is divided into the two segments the company covers. One is systems business (hereafter SB), and the other one is robot business (hereafter RO).

SB covers all inquiries, including turnkey applications. RO covers inquiries, including those solely for robots. RO inquiries are usually sent by system integrators for end-users or also by the end-users themselves. Depending on the type of inquiry, SB or RO, it is taken over from the person covering the segment of the inquiry. The person taking over the inquiry should also ensure the inquiry is put into Salesforce in the navigation item called "Opportunities." If the inquiry is sent from an existing customer, the previously agreed

person for managing this customer's account is responsible for taking care of the customer since they have prior knowledge about all the opportunities and actions made on the account.

To understand the whole process of using Salesforce, we will closely look at what information is put into Salesforce and how it is handled. The Salesforce navigation bar consists of several navigation items, which can be added and personally arranged for every user and can differ from subsidiary to subsidiary needs. However, we will focus only on the navigation items agreed to use by all users in Yaskawa Slovenija, which are:

5.2.1 Home

This navigation item offers a route to the so-called homepage, where every user can find a specific dashboard, recent items, today's events, and today's tasks.

5.2.2 Leads

As the name says, this item is used to save information about all potential contacts that someday could become customers. When creating a new lead, the user must follow a predefined set of rules on how to complete the fields for a new lead. The most important fields are marked with a red star, which means that a new lead cannot be saved without filling these fields. Other non-mandatory fields are fulfilled by internal agreements, and some can be left blank.

The item "lead" is divided into six sections: lead information, address information, company details, product potential per year, data protection, and system information. If starting from the beginning, the user should navigate to the Lead Information section (Figure 5), first choose the relevant title between two options from the picklist, which are Mr. or Mrs. The following fields include First Name and Last Name, which are mandatory. If the user has information regarding the lead's job title, that is also recommended to include. It is helpful when fulfilling the mandatory field about Decision level, where the user can choose between a follower, a decision supporter, or a decision-maker. Other mandatory fields are Company, i.e., where the lead comes from; Organization, where the user chooses the organization in which they work (in this case, it is always YSL, short for Yaskawa Slovenija); Lead Status, which is always chosen as "Open" because of an internal agreement; and Preferred Language, where the lead's main language is selected.

In Figure 5, red-marked fields show mandatory fields, and green-marked fields show those which can be filled but are not mandatory. In the next section, as shown in Figure 6, green-marked fields are full fields but are not mandatory and include address information, where users put the information about country, street, postal code, city, email, phone, and phone mobile. In the section regarding Company details, shown in Figure 7, the user can choose several pieces of information from the dropdown list, including the Industry; the Sales

Channel, which outlines whether the customer is buying directly or not; and Customer Category, where an internal agreement means that only End User or System Integrator are selected. For Customer Type, we choose between a Customer or Potential Customer. The sections product potential per year, data protection and system information are left incomplete.

When opening a created lead, the lead's campaign history is available their notes section, based on previous activity (such as phone calls or visits). A lead list view allows users to more easily follow this information. For example, these include my leads open, recently viewed leads, and so on.

Figure 5: New Lead – Section lead information

Adapted from Salesforce (2022).

Figure 6: New Lead – Section Address Information

Adapted from Salesforce (2022).

Figure 7: New Lead – Section Company details

Adapted from Salesforce (2022).

5.2.3   Accounts

Similarly to leads, accounts also have mandatory and regular fields, which must be fulfilled through predefined internal rules. The item "Accounts" is divided into five sections, which are Account Information, Address Information, Company Details, Product Potential Per Year and ERP Customer Number. Under "Account Information," as shown in Figure 8, the user must complete three mandatory fields, which are Account Name (company name), Organization (the user selects the organization in which they work), and Interest (the user selects which product section the costumer organization is interested in). Since Yaskawa Slovenija offers only robots and does not offer drive and motion controls, users always choose option R, which stands for robotics.

The next section is Address Information, shown in Figure 9. The user should fill in the fields of billing country, billing street, postal code, billing city, and phone number. While these are not mandatory, it is internally agreed that these should be completed.

In the section, Company Details, shown in Figure 10, users must complete four mandatory fields, but the other fields can remain blank. One of the mandatory fields is Industry, where the users select an answer from the drop-down list based on the type of industry in which the company works. For example, the drop-down list contains several options such as Agriculture & Forestry, Construction, Electronical & Electrical, Machine Tooling, Metal & Metal Products, Packaging, and so on. Meanwhile, in the mandatory field, Sales Channel, users select from the drop-down list how the company makes a purchase. The two options are direct (direct from the business) or indirect (through a system integrator, distributor, or some other third-party channel).

In the mandatory field, Customer Category, there are nine different options. However, it is internally agreed that users should choose only between an end-user or a system integrator. As with the Customer Category, the field "Customer Type" also offers nine options, but users usually choose between customer, potential customer, or not anymore existing. The two sections, Product Potential Per Year and ERP Customer Number are left blank.

As with the Leads section, in Accounts, we can write down any activities in the notes section and create an account list view. One of the most used features is searching for opportunities by account, where we can see all of the offers sent to a specific account.

Figure 8: New Account: Section Account Information

Adapted from Salesforce (2022).

Figure 9: New Account - section Company details

5.2.4   Contacts

The navigation item, Contacts, is divided into three sections: contact information, address information, and data protection. Figure 11 shows the contact information section, where users first choose the Salutation of the customer, then write down the name and surname, which is mandatory. If users also know the job title of the customer, it's good to also fill this in, as it further helps users decide what to pick in the mandatory field, decision level, where users choose between follower, decision-supporter, and decision-maker. Another mandatory field is "account name," which tells us in which company the contact is working. To complete this field, the account name must pre-exist in Salesforce. For example, if users want to enter a new contact from a new company, they first have to save the company in "items account" and only then also a contact. Two further mandatory fields are preferred language, where users choose the contact's language from a drop-down list, and the field of interest, where users mark what the contact is interested in. As said before, users always choose R for this, which stands for robotics. In the field status, users can choose whether the contact is active or if they have left the company. Users also have an option to also mark the box "Christmas card," which indicates whether contact will receive a Christmas card or not. In the address information sections, as shown in Figure 12, users need to complete the fields such as mailing country, mailing street, postal code, mailing city, and phone number. Section data protection is usually left blank.

Figure 10: New Contact - Section Contact Information

Figure 11: New Contact – Section Address Information

Adapted from Salesforce (2022).

5.2.5 Opportunities

One of the most regularly used items is "opportunities" which can be used daily for every sent offer, regardless of whether it's for robotics or system business. Usually, new opportunities are created by the sales engineers since they typically send out offers. This section is divided into five section titles, ordered as follows: opportunity information (shown in Figure 13), project details (shown in Figure 14), additional information, description information, and other information.

In the opportunity information section, users must complete five mandatory fields, starting with the "opportunity name" field, where users follow predefined internal rules regarding how to write this information. First, they write a company name, then the product or project for which the company is inquiring for. This is very useful with a list of opportunities as users can rapidly define which customer this opportunity is for and what they were inquiring about previously.

Another mandatory field is "account name," which must preexist already (as explained in the "contacts" section). The end-user field is also closely connected with account name; here, users input information about the end-user, if an inquiry was sent by the system integrators and such information is available.

In "campaign currency," users select the most applicable currency – in this case, this is always EUR, as all offers are prepared with Euro currency. Close date is one of the most important and mandatory fields, where users mark the date for the customer to receive the order. "Stage" is where users choose the stage of an opportunity. This field offers several options, but as internally agreed, users choose only between the following:

36

- Quotation sent, which means that the offer was sent
- Decision process customer, which means that the customer is deciding and will probably send an order
- Project on hold, which means that the offer is still actual but is currently stopped and will be active again after some time
- Decision/contract won, which means when that an order was received
- Decision/contract lost, which occurs when the customer informs us that the offer is not needed anymore. In events of selecting decision/contract lost, users have to fill out an additional non-mandatory field called won/lost reason where they can elaborate on the reasons behind the lost opportunity, for example, price, delivery time, canceled by the customer, etc.

The"probability" field is very closely connected to the "stage" and outlines the chances of winning this opportunity. When we choose the stage, "quotation sent," the probability is automatically set to 20%; when we choose the stage, "decision process customer," the probability is set to 80%; and when users choose "decision/contract won," the probability is set to 100%. Nevertheless, the probability field can be manually set by choosing a different percentage from the drop-down list.

The field "project net value" is fulfilled only when there is an inquiry for system business; users should fill out the whole value of a project. "Check box," in forecast robotics, is marked if we know that the customer will order or when we receive an order. Under "project details" sections, users must fill out five mandatory fields, starting with division, where they choose if this opportunity is only for robotics (marked RO), or it is a whole project and belongs to system business, marked SB. Another mandatory field is organization, where users as explained before should always choose YSL. In the field "industry and application," users choose the most relevant selection to the project. The estimated delivery date marks when the customer would like to receive the robot or application. This date should never be before the close date. Logically, for example, the robot cannot be delivered to the customer before receiving an order for it.

The two fields which are non-mandatory but are completed in this section are "quotation-number-Yaskawa," where users enter the number of the offer, and "ERP reservation number," where users put the reservation number if they asked to reserve the robot for this project. The remaining three sections should remain blank.

After saving the opportunity, the work is not yet complete since every user must then add the product to the opportunity, where they can choose the type of product, quantity, and price. In the notes section, users usually write down all calls and information the customer provides about the status of the opportunity. However, due to the lack of storage, we do not attaching the pdf files of offers.

Figure 12: New opportunity - section Opportunity information

Adapted from Salesforce (2022).

Figure 13: New Opportunity - Section Project Details

Adapted from Salesforce (2022).

5.2.6   Reports and Dashboards

Reports and dashboards are usually used for the personal needs of every user and are not used often. In case the management team needed a report or dashboard, these would usually be prepared by a power user.

5.2.7   Campaigns

Item campaign is used for every fair or event the company has attended. This item consists of five sections where only two are used. The first is "campaign information," where users have to enter the campaign name (as shown in Figure 15). The general structure is to first write the name of a fair or event, then the city in which the event is held, then the country, year, purpose, and abbreviation of the country (example: IFAM-Ljubljana-Slovenija-2020-Robotics-Slo). Another mandatory field is currency, where users should always choose the Euro. Other non-mandatory fields to complete include organization, start date, and end date. Using campaigns is very useful because we can follow the leads and contacts that visited us at a specific fair or through an event based on the campaign member list.

Figure 14: New Campaign - Section Campaign Information, Planning and E-mail Subject

Adapted from Salesforce (2022).

5.3   Challenges and Analysis of the Sales Process

Under a more detailed review of a sales process in Salesforce, I have found that several pieces of information is being duplicate, mostly in section of contacts and accounts. In the " opportunities " section, several opportunities have closing dates saved in the past or estimated delivery dates set before the closing date.

When creating a new opportunity, users have to complete two mandatory fields, industry and application, but sales engineers, when creating an opportunity, do not always have this information but still have to choose something anyway. Often, with a large amount of work and offers, users forget to return to the opportunity and correct these fields with right information, provided by the customer.

One of the two biggest challenges relates to the hit rate. As Yaskawa Slovenija is supervised by Yaskawa Europe, users should be careful to report correct, complete data relating to the opportunities. Challenges arise when the company receives an inquiry from several different system integrators while knowing they are inquiring for the same end customer. Only one system integrator will win the project, but there's no way to tell which one. Therefore, one can choose between two options, neither of which are necessarily correct. First, users could create opportunities for all inquiries from system integrators and consequently spoil the hit rate since only one opportunity will be marked with the stage "decision contract won." The second option is to save only one opportunity for one system integrator and later correct it if the other system integrator won the project, and consequently know that because of not entering all data, we have lost track of other not entered opportunities. The same challenge is present when the system integrator or end-user inquiries about several different types of robot, but in the end, they will usually only purchase just one type of robot. In this case, there are two available options again: to save the product as "all types of robots" or to choose only one type of robot and correct it later once the customer decides which one to order. The first case would again damage the hit rate; meanwhile, the second case would lose track of information.

The research determined that many users are not exploiting all of the advantages of reports and dashboards; moreover, many are using an Excel sheet to keep a record of sent opportunities alongside Salesforce and therefore are recording the same information twice, causing double the work unnecessarily.

This information is related to the work of the sales engineer team, which consists of five employees, two of whom have used Salesforce since it was integrated (in 2013), two have used it for approximately three years, and one has used Salesforce since June 2021. The user with the least experience in using Salesforce reported completely different additional struggles, stating that Salesforce offered too many options at once, causing a lost feeling, and that there were too many options across different fields.

5.4 Suggestions and Improvements

After reviewing the sales processes and finding the main flaws, I have started working on improvements that could be implemented, step by step. Since data quality is important on the whole EMEA level, all entities got help with data cleaning in the form of a set dashboard, where the quality of data can be followed and therefore know what and where improvements could be implemented. The dashboard showed that there were several accounts without the mandatory fields completed since mandatory fields were implemented after several accounts had already been created. I have also fix the accounts, leads, contacts and opportunities, which had inactive users as an owner, this happens when someone leaves the company, but their accounts, contacts, and opportunities have to be assigned to someone else. Within this, all duplicates were merged into a single account or contact. Data cleaning and checkups in Yaskawa Slovenija were made by a "power user" profile.

Since the field "close date" is so important for all entities, the IT section improved the back of the system through an email announcement one day before the opportunity will have the close date in the past. I have noticed that if users did not correct the close date immediately the same day they receive the email announcement, they usually forgot about it. Therefore, I focused on untapped potential and create personalized dashboard for each sales engineer and management as well. This helped minimize the problem around close dates and enable tracking of all information to raise awareness.

Each personalized dashboard for sales engineers consists of several reports run behind the dashboard. The reports and indicators are described below. Figure 16 shows the new sales engineer dashboard, including all indicators. Confidential information regarding the business's financial performance and numbers is hidden with white rectangles. The dashboard is also available in the Appendices as Appendix 2.

- **Close date in the past:** The first indicator in the dashboard for sales engineers shows all opportunities with the close date in the past. The robot division structured the information so that sales engineers can quickly see which segments have opportunities with Close dates in the past. By clicking on the link "view report," users can also obtain a more detailed overview of information; in this case, they receive a list of opportunities with the close date being in the past.
When creating a report for this dashboard indicator, it is important to create a "close date" not to a calendar date but instead use the relative date such as "today." Otherwise, the dashboard will not be automatically updated each day.
- **Estimated delivery date < close date:** Closely connected with the first indicator is an indicator showing opportunities where the estimated delivery date is set up before the close date. By clicking on the link "view report," users can also get detailed information.
- **Open opportunities this month:** With a large amount of work, users can easily focus more on new inquiries and forget about old ones for which they already sent offers and put them in Salesforce. To keep track of sent offers, I have set up a new indicator that

shows open opportunities of current month. There should be only opportunities for which the sales engineers can expect an order in the current month. By the end of the month, many records of opportunities can show that users lost out on regular monitoring of their opportunities.

− **Opportunities – booking:** Another important indicator shows the opportunities distributed by month, providing information on the total value of all open opportunities and the project's net value by each month.

− **Opportunities – Industry:** To keep track of the mandatory field "Industry" in the item "opportunities," an indicator was created showing how many opportunities a sales engineer has in each industry. Ideally, this should cover all segments of the industry. From this, the sales engineer can quickly see which industry segments they have to complete more work on or if there is an individual segment that strongly prevails above the others. The sales engineer can also quickly check whether these are opportunities that went uncorrected for the field named "Industry."

− **Opportunities – won- this FY- No. Robots and Opportunities – won – this FY – Project Net Value:** Because it is crucial to have written, understandable, and measurable goals that are always available to see; as such, two different graphs run behind a singular report. The first indicator graph shows the sales engineer how many robots they have sold until now in the current fiscal year. This accounts for robots from both RO and SB segment. Another indicator shows how much profit or project net value they have made for the RO and SB segments together. From this, the sales engineer can easily see how far or near they are from their set up goals.

Figure 15: Dashboard for sales engineers

Adapted from Salesforce (2022).

Similarly to the dashboard for each sales engineer, the dashboard for management also includes the indicator for the close date, which is not structured by robot division segment

but by the user. Therefore, the management team can consider the work of each sales engineer. The dashboard also includes an indicator for won opportunities of this FY, which shows the number of robots and project net value for RO and SB together and for each segment separately. The indicator "opportunities-booking," which sales engineers also have access to, shows the bookings by month for RO and SB together and separately for each segment.

The new indicators for management only are the in-forecast robotics indicator, which shows the opportunities which have "stage" set to "decision process customer," and probability from 80% to 90%, which means that an order from the customer is expected and the team wants to report these robots for further planning of lead times. The next new indicator shows the opportunities, which have a probability of more than 80%, from which one can easily see which are these companies. The indicator of won opportunities for FY shows won opportunities by month.

Besides a dashboard for management, which is intended for regular FY, a dashboard for the last FY is also available with the same indicators but with filters set only to "won" opportunities. The management, therefore, have a quick access to gathered data and results from the past year, which shortens the time spent looking for information and gives more power when planning strategies.

Nevertheless, set dashboards improved the sales process and challenges around it, but two open challenges remained. One was for creating opportunities in case of inquiry of several system integrators for one end-user, and the other one is creating opportunities in case of inquiry for different types of robots. To overcome this, other entities were questioned to determine their experiences and identify how they handled this.

Regarding the first challenge, about creating the opportunities in case of inquiry of several system integrators, other subsidiaries usually create an opportunity for each inquiry, as they perceive this to be the most important piece of history, even if it spoils the hit rate. However, they also stated that cases like that are very rare; therefore, the spoiled hit rate is less impactful.

Answers regarding opportunities with inquiries of several types of robots were largely the same, as in this case, this was also a significant piece of history, but it varies from user to user by personal preference. As such, one suggestion for this case would be to add only the most relevant type of robot and in field Opportunity name and include all offered types of robots. Therefore, users can quickly find information about what was offered and only count one type of robot without spoiling the hit rate. Still, one must take into consideration here that the hit rate might not be entirely correct if the user chose the wrong type of robot in the "product" section. This could make a minor deviation if choosing all types of robots in the "products" section.

Table 3 presents all challenges and potential opportunities and identifies improvements and suggestions.

Table 3: Improvements and suggestions

Challenges and potential	Improvements	Suggestions
Quality of data (missing fields, duplicates…)	– merged duplicates – fulfill missing fields	
Field - closed date	– email alerts – dashboard for user and management	
Field - Estimated delivery date	– dashboard for user and management	
Mandatory fields in opportunities (Industry, application)	– set dashboard	
Inquiry of several system integrator for one end user	/	– in FC robotics field
Inquiry of system integrator for several types of robot	/	– in the field Opportunity name write all types of robots, in products add just one type of robot
Management awareness	– dashboard	
Using Excel besides Salesforce	– training for use of Reports and Dashboards	

Source: Own work.

5.5   Interview of Employees After Implementing Changes

A survey is one of the best methods to check the satisfaction of users and the condition of the sales process; however, since there are only nine licensed employees in Yaskawa Slovenija for Salesforce, I decided to gather primary data with partially structured interviews. Nevertheless, of the nine employees who held licenses, only the sales engineers and sales managers using Salesforce in full functionality were interviewed. So, five users were interviewed separately on-site at Yaskawa Slovenija. The full interview is available in Appendix 3, and answers are gathered together.

Interviewees were between 30 and 51 years of age. One was a beginner in using Salesforce and the others had used it for several years. Four had never used Salesforce or any other CRM platform before they were employed at Yaskawa Slovenija. Basic interviewee information is displayed in Table 4. Mostly, interviewees used Salesforce very often, one on a daily basis and the others a few times per week, with the exception of one management team member, who only used Salesforce a few times per month before the improvements. Interviewees stated different struggles and challenges before the improvements were made, such as the close date of opportunities in the past, estimated delivery times being before close dates, duplicates, etc. However, they all shared a common problem regarding close dates in the past.

The results show that after implementing the improvements, there were fewer problems regarding missing fields, duplicates, close dates, etc. Two of them are still recording data in other ways alongside Salesforce, such as by monitoring their data in Excel. The reason for this was explained to be how the individual preferred to store internal remarks for him.

Upon questioning which further improvements would they wish to see, the person who still used Excel alongside Salesforce answered that they would wish to have a new, non-defined field to use for notes and remarks.

Table 4: Basic Information of Interviewees

Interviewees (users)	Age	Gender	Time of Using Salesforce	Frequency of using Salesforce
Sales Engineer 1	30 years	male	Approx. 6 months	Two times per week
Sales Engineer 2	31 years	male	Approx. 4 years	Every day
Sales Engineer 3	46 years	male	Approx. 9 year	Every day
Sales Engineer 4	46 years	male	Approx. 8 years	When it is necessary
Management	51 years	male	Cannot define	Every day

Source: Own work.

Users who had used Salesforce for a longer duration and are therefore more advanced in using it, have entirely different views and perceptions regarding the struggles and challenges. One of the turning points was also that users who hadn't used Salesforce for longer period of time, are also not using it less frequently throughout the day, as seen in the case of Sales Engineer 1 and the Management who had never used Salesforce before the implemented Dashboards. More advanced users and those using Salesforce more frequently, usually on a daily basis, were also more aware of different struggles, and even all stated the same problem, which was around the closing date in the past. After the improvements were made, the same users stated that they found fewer close dates in the past and had less trouble compared to what they usually experienced before.

For Sales Engineer 1, as predicted, there was no big impact since he was not aware of this problem before. A significant connection existed between Sales Engineer 2 and Sales Engineer 3, as they both used an additional program alongside Salesforce to collect information about their offers. The reason for this was, as Sales Engineer 2 stated: "For now, I am still keeping the data in Excel sheet as before, but less and less. The reason why I am still using it is because I usually write down some remarks for me." The other also mentioned that he missed having a field where he could save internal information about the offers, and it would not be shared with others; therefore, one can conclude that this is the reason why they are still using additional programs.

In general, the opinion of all interviewees after the improvements were implemented resulted in positive feedback. Their opinions regarding different struggles after improvements are shown in Table 5. All agreed or strongly agreed that there were fewer missing fields. I

believe this is due to the fact that, after improvements were made, there were no possibility to save the data without filling in the mandatory fields. For fewer duplicates, only Sales Engineer 1 answered that he neither agreed nor disagreed, for which I think the reason is that they were quite a new user and were not aware of this problem since other users had faced this problem after using Salesforce for longer period of time. The same reason I believe is also true for his answer about finding information faster, as he stated: "The fact that I am a beginner, I have quite problems of getting used to Salesforce and using already the basic features." All agreed or strongly agreed that they had a better overview of information. Regarding better leadership management, only Sales Engineer 3 could not agree or disagree, and a reason behind this was not found.

Regarding having more time for other things, there were more dispersed opinions. The Management respondent and Sales Engineer 3 agreed about it, but others did not. For Sales Engineer 1, the reason may be because they are quite a new user and already have to invest a lot of time to get used to the system. For Sales Engineer 2, it is believed that the reason might be because they use Salesforce daily, but only for checking the close dates and not also for real-time data entry. As stated, "I put the information about contact and opportunities for week or two behind." This clearly demonstrates that, after a few weeks, it is time-consuming to input all of the information into the system after a few weeks. For Sales Engineer 4, it seems likely that they thought they still spent the same amount of time entering the data for opportunities or checking close dates.

Overall, the improvements seem to have made a positive impact on the management, who described the situation as: "Salesforce is now more useful for the management, what was also a goal. I can directly see the work of my sales team without losing time on the meetings. The created dashboard made me use Salesforce daily."

Nevertheless, while some struggles and challenges were solved or minimized, new challenges may arise with time. As the management said: "Through time, we will see if we would need some new indicators in the dashboards or other new implementations."

Table 5: Opinions after improvements

	I strongly disagree	I disagree	I neither agree or disagree	I agree	I strongly agree
Less missing fields				Sales engineer 3,4, Management	Sales engineer 1, 2
Less duplicates			Sales engineer 1	Sales engineer 2, 3, management	Sales engineer 4
Less closed dates in the past					Sales engineer 1, 2, 3, 4, management

				Sales engineer 2	Sales engineer 1, 3, 4	Management
Faster finding information				Sales engineer 2	Sales engineer 1, 3, 4	Management
Better overview of information					Sales engineer 3, 4	Sales engineer 1,2, management
Better leadership management				Sales engineer 3	Sales engineer 1,2, 4, management	
More time for other things			Sales engineer 1,2,4		Sales engineer 3	Management

Source: Own work.

CONCLUSION

Through the process of this master thesis, it has become apparent that there is more than one crucial factor for the successful implementation and use of a CRM platform. A combination of all factors, including technology, process, and people, is needed to successfully use the CRM platform and obtain benefits from it. It is important for companies to set a strategy, choose the right technology, and have support from employees. When talking about the factor of people, it is important that users understand the goals of using a CRM platform and that the management stands firmly behind its concept. Users who can see the benefits for themselves will adapt and accept changes more quickly, so long as it is not simply another task they have to do because of a management decision.

This master thesis first determines the concept of the sales process and continues with the presentation about CRM, its evolution, types, initiatives, advantages and disadvantages, obstacles, and success factors. Through this process, it was found that implementation of CRM in companies can often be unsuccessful due to the fact that the company does not understand the concept of CRM, has a lack of information, or underestimates the needed commitment of the management having clear goals and setting a CRM strategy.

The next section briefly presented cloud computing before focusing on Salesforce and analyzing its use in the sales process in Yaskawa Slovenija. When analyzing this, numerous challenges and struggles were presented, which were mentioned throughout the literature and which were presented in the section on CRM. After analysis of Salesforce in the sales process, there was potential to make improvements to combat several challenges.

The main challenges around Salesforce in the sales process were quality of data, such as missing fields, duplicates, wrong inputs, etc., close dates in the past, wrongly set estimated delivery dates, incorrect chosen industries in "opportunities," struggles with inquiries from system integrators, management awareness, untapped potential around reports, and much more.

The plan and goals for improvements were not widely accepted by the employees initially, who were skeptical and resistant to new changes. Some users were not even aware of some of the main challenges, and if they did not have a problem with something that the other user have they were not aware of it. The great role here was held by the management, who supported the idea at all times. After the implemented improvements, they were positively accepted by employees as soon as they saw that this had a beneficial impact on their work. The implements reflected zero missing fields, zero duplicates, fewer wrong inputs, fewer close dates in the past, made users use Salesforce more often, etc.

I believe that the company has improved some steps in its sales process, which are seen in the work of employees and also in the results. Before the process of this master thesis, it was assumed that only several missing improvements would have to be made and that the use of the CRM platform would be in full functionality. Both the researcher and the company learned that this is an ongoing process and that it should be followed with improvements over time, as the company is continuously growing and hence will have different needs. The biggest impact in this company was made by the users, who should ensure they are using Salesforce as it was agreed and that they collaborate together.

This master thesis has made a significant impact on Yaskawa Slovenija, which listened to suggestions and implemented several improvements, which has already reflected on the work of employees and, therefore, also on the sales process in Salesforce. Nevertheless, the subsidiaries of Yaskawa Europe have different needs and are facing different situations; as such, while some challenges will remain the same, others may differ. It is hoped that this master thesis could help them with the provided suggestions and good practices from implemented improvements. Furthermore, it would be valuable to also continue with the research on subsidiaries and include more people in the interviews or through a survey, as the main limitation of this research was that it was limited only to interviews with five users. The research could also be useful for other companies, and it would be valuable to further compares the different impacts and results.

REFERENCES

1. Anderson, K. & Kerr, C. (2002). *Customer Relationship Management*. New York: McGraw-Hill.
2. Armour, H. (2021). *Sales Force Automation (SFA) for 2022.* Retrieved March 1, 2022 from https://www.reallysimplesystems.com/blog/sales-force-automation/
3. Beckwith, H. (2003). *Prodaja nevidnega: vodnik po sodobnem marketingu.* Ljubljana: Lisac & Lisac.
4. Burns, R. (2017). *CRM Goals: 4 Objectives for your CRM Strategy.* Retrieved November, 7 2021 from https://www.activecampaign.com/blog/crm-goals
5. Chakravorti, S. (2007). *Customer Relationship Management (CRM), A holistic understanding.* Saarbrücken: VDM Verlag, cop.

6. Chalmeta, R. (2006). Methodology for customer relationship management. *Journal of systems and software, 79*(7), 1015-1024.

7. Damij, T. & Indihar Štemberger, M. (1997). *Uvod v poslovno informatiko in računalništvo.* Ljubljana: Ekonomska fakulteta, Enota za založništvo in Študij na daljavo.

8. Doshi, S. (n.d.). *THE CEOʹs Guide to CRM Success.* Retrieved May 26, 2022 from https://mthink.com/legacy/www.crmproject.com/content/pdf/CRM4_wp_doshi.pdf

9. Drapkin, A. (2022). *Advantages (and Disadvantages) of CRM Software.* Retrieved May 25, 2022 from https://tech.co/crm-software/advantages-disadvantages-crm

10. Dyche, J. (2005). *The CRM Handbook, A business guide to customer relationship management* (8th printing). Boston: Addison-Wesley.

11. Farrar, J. (2021). *What does Salesforce do?* Retrieved September 8, 2021 from https://www.salesforce.com/blog/what-does-salesforce-do/#h-what-about-it

12. Fuchs, J. (2019). *The 3 Types of CRM Software (and which is right for your business).* Retrieved November 10, 2021 from https://blog.hubspot.com/sales/types-of-crm

13. Gessner, M. (n.d.). *Why is Salesforce so popular?.* Retrieved March 25, 2022 from https://focusonforce.com/crm/why-is-salesforce-so-popular/

14. Goodey, P. (2013). *Salesforce CRM: The Definitive Admin Handbook.* Birmingham: Pack Publishing Ltd. Retrieved April 3, 2022 from https://web-p-ebscohost-com.nukweb.nuk.uni-lj.si/ehost/ebookviewer/ebook/bmxlYmtfXzYxOTk4MF9fQU41?sid=869abb04-a568-486e-943c-3e3186289c95@redis&vid=2&format=EB&rid=1

15. Habbe, J. (2016). *Skrivnosti uspešne prodaje: Razumevanje kupcev, samozaupanje, iskanje prodajni priložnosti, prodajni process in vodenje za uspešno prodajo po meri poslovnih kupcev.* Ljubljana: Poslovno svetovanje Jure Habbe, s.p.

16. Höllwarth, T. (2012). *Pot v oblak.* Ljubljana: Pasadena d.o.o.

17. Jereb, J. (ed.). (2021). *Industry 4.0 and Robotics.* Ljubljana: Jožef Stefan Institute.

18. Injazz, J. C & Popovich, K. (2003). Understanding customer relationship management (CRM), People, process and technology. *Business Process Management Journal, 9.*

19. JavaTpoint. (n.d.a). *Overview of Cloud Computing.* Retrieved December 27, 2021 from https://www.javatpoint.com/salesforce-overview-of-cloud-computing

20. JavaTpoint. (n.d.b). *Salesforce Architecture.* Retrieved January 6, 2022 from https://www.javatpoint.com/salesforce-architecture

21. JavaTpoint. (n.d.c). *Salesforce.com offerings – Services by Salesforce.* Retrieved January 5, 2022 from https://www.javatpoint.com/salesforce-dot-com-offerings-services-by-salesforce

22. Jula, A., Sundararajan, E. & Othman, Z. (2014). Cloud computing service composition: A systematic literature overview. *Expert System with Applications, 41*(8). Retrieved April 1, 2022 from https://www.researchgate.net/publication/259266163_Cloud_Computing_Service_Composition_A_Systematic_Literature_Review

23. Kabi. (n.d.). *Kaj je CRM?* Retrieved November 6, 2021 from https://crm.kabi.info/Kaj-je-crm/

24. Karatkevich, A. (2019). *Is Salesforce your best fit? Consider Its Prons and Cons to Decide.* Retrieved January 7, 2022 from https://www.scnsoft.com/blog/salesforce-pros-and-cons

25. KeyNode. (2019). *What are Sandboxes in Salesforce?* Retrieved April 1, 2022 from https://medium.com/@KeyNodeTeam/what-are-sandboxes-in-salesforce-8f632f5f4123

26. Kotler, P. (1996). *Marketing Management - Tržensko upravljanje analiza, načrtovanje, izvajanje in kontrola.* Ljubljana: Slovenska knjiga.

27. Kulpa, J. (2017). *Why Is Customer Relationship Management So Important?* Retrieved May 26, 2022 from https://www.forbes.com/sites/forbesagencycouncil/2017/10/24/why-is-customer-relationship-management-so-important/?sh=729480147dac

28. Lovelock, C. H. & Wirtz, J. (2022). *Services marketing: People, Technology, Strategy.* New Jersey: World Scientific.

29. Lowe, M. (2019). *Sales Linearity-How To Drive Sales With A Linear Sales Process.* Retrieved March 18, 2022 from https://www.clari.com/blog/how-to-drive-sales-linearity

30. Lucidchart. (n.d.). *7 –step sales process: When to use it and when to break it.* Retrieved December 12, 2021 from https://www.lucidchart.com/blog/what-is-the-7-step-sales-process

31. McCarthy, B. (2021a). *How to Secure Your Salesforce Mobile App.* Retrieved March 31, 2022 from https://www.salesforceben.com/how-to-secure-your-salesforce-mobile-app/

32. McCarthy, B. (2021b). *What is Salesforce & Why it is so Popular?* Retrieved March 31, 2022 from https://www.salesforceben.com/what-is-salesforce-a-beginners-guide/

33. Mell, P. & Grance, T. (2011). *The NIST Definition of Cloud Computing: Recommendations of the National Institute of Standards and Technology.* Gaithersburg: Computer Security Division, Information Techonology Laboratory, National Institute of Standards and Technology. Retrieved April 1, 2022 from https://www.nist.gov/publications/nist-definition-cloud-computing

34. Miklavcic, M. (2017). *Kaj je CRM sistem.* Retrieved November 6, 2021 from https://oglasevanjenaspletu.si/kaj-je-crm-sistem/?cookie-state-change=1541781553834

35. Mohanan, S. (2020). *10 Best Salesforce Dashboards: A Comprehensive Guide.* Retrieved April 2, 2022 from https://hevodata.com/learn/best-salesforce-dashboards/#usd

36. ORO Inc. (2020). *A brief on Three Types of CRM: Operational, Analytical, Collaborative.* Retrieved November 6, 2021 from https://oroinc.com/orocrm/blog/a-brief-on-three-types-of-crm-operational-analytical-collaborative/

37. Palmer, S. & Weaver, M. (1998). *Information Management.* Oxford (UK): Butterworth-Heinemann.

38. Paul, I. (2021). *Salesforce Lightning vs Classic Compared.* Retrieved March 26, 2022 from https://tech.co/crm-software/salesforce-lightning-vs-classic-compared

39. Payne, A. & Frow, P. (2013). *Strategic Customer Managament. Integrating Relationship Marketing and CRM.* New York: Cambridge University Press.

40. Raza, M. (2020). *Public vs Private vs Hybrid: Cloud Differences Explained.* Retrieved December 28, 2021 from https://www.bmc.com/blogs/public-private-hybrid-cloud/

41. RedHat. (2018). *Types of cloud computing.* Retrieved December 27, 2021 from https://www.redhat.com/en/topics/cloud-computing/public-cloud-vs-private-cloud-and-hybrid-cloud

42. Repin, A. (2020). *A tried and Tested Process to Implement Your CRM.* Retrieved May 26, 2022 from https://www.scnsoft.com/blog/crm-implementation-plan

43. Rogers, W. (n.d.). *The 16 Do´s of Highly Effective Sales Managers.* Retrieved May 26, 2022 from https://www.salesforce.com/resources/articles/effective-sales-managers/

44. Rounseville, J. (2020). *A Brief History of Salesforce: From Telegraph Hill to The Tower.* Retrieved January 5, 2022 from https://www.j2interactive.com/blog/brief-history-salesforce/

45. Salesforce.com. (2022). *Get started with Salesforce.* Retrieved March 25, 2022 from https://resources.docs.salesforce.com/latest/latest/en-us/sfdc/pdf/basics.pdf

46. Salesforce.com. (n.d.a). *Introduction to Reports and Dashboards.* Retrieved. March 28, 2022 from https://trailhead.salesforce.com/en/content/learn/modules/reports_dashboards/reports_dashboards_overview

47. Salesforce.com. (n.d.b). *The History of Salesforce.* Retrieved January 5, 2022 from https://www.salesforce.com/news/stories/the-history-of-salesforce/

48. Salesforce.com. (2022). *Yaskawa Emea Salesforce.* Retrieved January 8, 2022 from: https://yaskawaemea.my.salesforce.com

49. Santos, J. (2019). *Customer Relationship Management: Strategic approaches in Digital Era.* Oakville: Society Publishing.

50. Snoj, B. & Iršič, M. (2017). *Menedžment prodaje-za teorijo in prakso.* Harlow: Pearson Education, cop.

51. Thakral, R. (2021). *Advantages and disadvantages of CRM.* Retrieved November 7, 2021 from https://www.targetintegration.com/advantages-and-disadvantages-of-crm/

52. Thompson, C. (n.d.). *Everything you need to know about Salesforce: the world's #1 CRM.* Retrieved January 5, 2022 from https://www.masonfrank.com/insights/everything-you-need-to-know-about-salesforce

53. UKEssays. (2015). *Definition of Customer Relationship Management Crm Marketing Essay.* Retrieved November 8, 2021 from https://www.ukessays.com/essays/marketing/definition-of-customer-relationship-management-crm-marketing-essay.php

54. University Canada West. (n.d.). *Why Salesforce is valuable tool for IT companies.* Retrieved March 25, 2022 from https://www.ucanwest.ca/blog/business-management/why-salesforce-is-a-valuable-tool-for-it-companies

55. Wikipedia. (n.d.). *Salesforce.* Retrieved January 5, 2022 from https://en.wikipedia.org/wiki/Salesforce

56. Wilson, A. (2021). *Top 10 Reasons to choose Salesforce for your Business.* Retrieved April 2, 2022 from https://www.rolustech.com/blog/10-reasons-to-choose-salesforce

57. Yaskawa America. (n.d.). *Yaskawa Stats.* Retrieved November 5, 2021 from https://www.motoman.com/en-us

58. Yaskawa Electric Corporation. (n.d.). *Yaskawa's History of 100 Years.* Retrieved November 5, 2021 from https://www.yaskawa-global.com/company/ profile/history

59. Yaskawa Europe GmbH. (n.d.). *About Yaskawa*. Retrieved November 5, 2021 from https://www.yaskawa.eu.com/about-yaskawa/About-Yaskawa

APPENDICES

Appendix 1: Abstract in Slovenian language

V današnjem svetu, z nasičenim trgom, se podjetja soočajo z več izzivi. Cilj vseh je biti eden izmed vodilnih na svojem področju, pri čemer se podjetja srečujejo z izzivom, kako izboljšati prodajno uspešnost, ki je tesno povezana z izboljšavo prodajnega procesa. Z razvojem informacijske tehnologije se imajo podjetja danes možnost soočiti s temi izzivi, z uporabo različnih tehnoloških orodij, ki jim dajo konkurenčno prednost. Zbiranje in analiziranje informacij omogočata doseganje večje produktivnosti, lažje sprejemanje odločitev, tržnih strategij, prepoznavanje vzorcev in zadovoljevanje potreb kupcev.

Danes so podjetja prisiljena razmišljati širše, ne samo o prodaji, ampak tudi o kupcih. Management odnosov z odjemalci s svojimi obeti za avtomatizacijo poslovnih procesov naj bi podjetjem omogočil, da bolje spoznajo svoje stranke in izboljšajo prodajni proces (Dyche, 2005). Z orodji za management odnosov z odjemalci lahko podjetja povečajo zadovoljstvo svojih strank in tako povečajo svojo prodajno uspešnost. Vendarle so lahko vse prednosti, ki jih orodja za management odnosov z odjemalci obljubljajo, premalo izkoriščene, če podjetja ne razumejo dobro tega koncepta. Kljub temu je več podjetij, ki so požela pričakovane koristi kot podjetij, ki so imela težave (Samit, 2007).

Eno izmed najpogosteje uporabljenih orodij in platform managementa odnosov z odjemalci je Salesforce, ki omogoča shranjevanje informacij o strankah, generiranje potencialnih strank, priložnosti, kampanj in zagotavlja vso zgodovino posamezne stranke. Znotraj organizacije oziroma podjetja prodajna ekipa lahko deli svoje zapiske ali dokumente, kar omogoča hitro obveščanje o posodobitvah, vseh članov o stranki. Tako je mogoče pripraviti bolj personalizirane ponudbe, prihraniti več časa in se osredotočiti na prodajne strategije in odločitve (Thompson, brez datuma).

Podjetje Yaskawa Slovenija je hčerinsko podjetje Yaskawe Europe GmbH. Nudi industrijske robote in robotske rešitve na območju nekdanje Jugoslavije. Zaradi širokega nabora strank, razpršenih po različnih državah, je še toliko pomembnejše, da sledi in analizira organizirane podatke, da podjetje ostane konkurenčno. V ta namen je podjetje implementiralo koncept managementa odnosov z odjemalci in orodje Salesforce. Tako kot številna druga podjetja se tudi to podjetje sooča z izzivi izboljšanja prodajnega procesa z uporabo tega orodja.

V okviru magistrskega dela je bilo predstavljeno in analizirano obstoječe stanje v podjetju, prepoznani izzivi ter predlagane in implementirane izboljšave. Namen magistrskega dela je prispevati k izboljšanju prodajnega procesa v podjetju Yaskawa Slovenija, z orodjem za upravljanje odnosov s strankami Salesforce. Delo je uporabno tudi za druga hčerinska podjetja in tudi ostala podjetja, ki v svojem prodajnem procesu uporabljajo Salesforce. Rezultati so zanimivi tudi za širšo javnost, kot so drugi raziskovalci in podjetja, ki se soočajo z enakimi izzivi.

Cilji magistrskega dela so:

–   proučiti in predstaviti management odnosov z odjemalci in orodje Salesforce, tako s teoretičnega kot tudi s praktičnega dela,
–   pregledati in analizirati celoten prodajni proces, vezan na orodje Salesforce, ter proučiti trenutno stanje,
–   podati predloge za izboljšave na osnovi proučenih informacij in zbranih podatkov, tudi iz drugih dobrih praks in strokovnih virov,
–   implementirati nekatere izmed dogovorjenih izboljšav,
–   proučiti stanje prodajnega procesa po izvedenih implementacijah.

V magistrskem delu so bile uporabljene različne vrste delovnih metod in tehnik, kot so deduktivno sklepanje pri primerjavi praks iz strokovne literature na primeru podjetja, empirična tehnika pri analiziranju prodajnega procesa in intervjuju zaposlenih. Magistrsko delo je razdeljeno na dva dela, teoretični in praktični del, pri čemer teoretični del temelji na proučeni strokovni literaturi, kjer so opisane povezane proučevane teme raziskovanja. V prvem delu je najprej predstavljen prodajni proces, čemur sledijo upravljanje odnosov s strankami, računalništvo v oblaku in Salesforce. V praktičnem delu je predstavljeno podjetje Yaskawa Slovenija, opisan in analiziran prodajni proces, vezan na Salesforce, predlagane izboljšave, implementirane spremembe, čemur sledijo tudi intervjuji z zaposlenimi.

Appendix 2: Dashboard for sales engineers
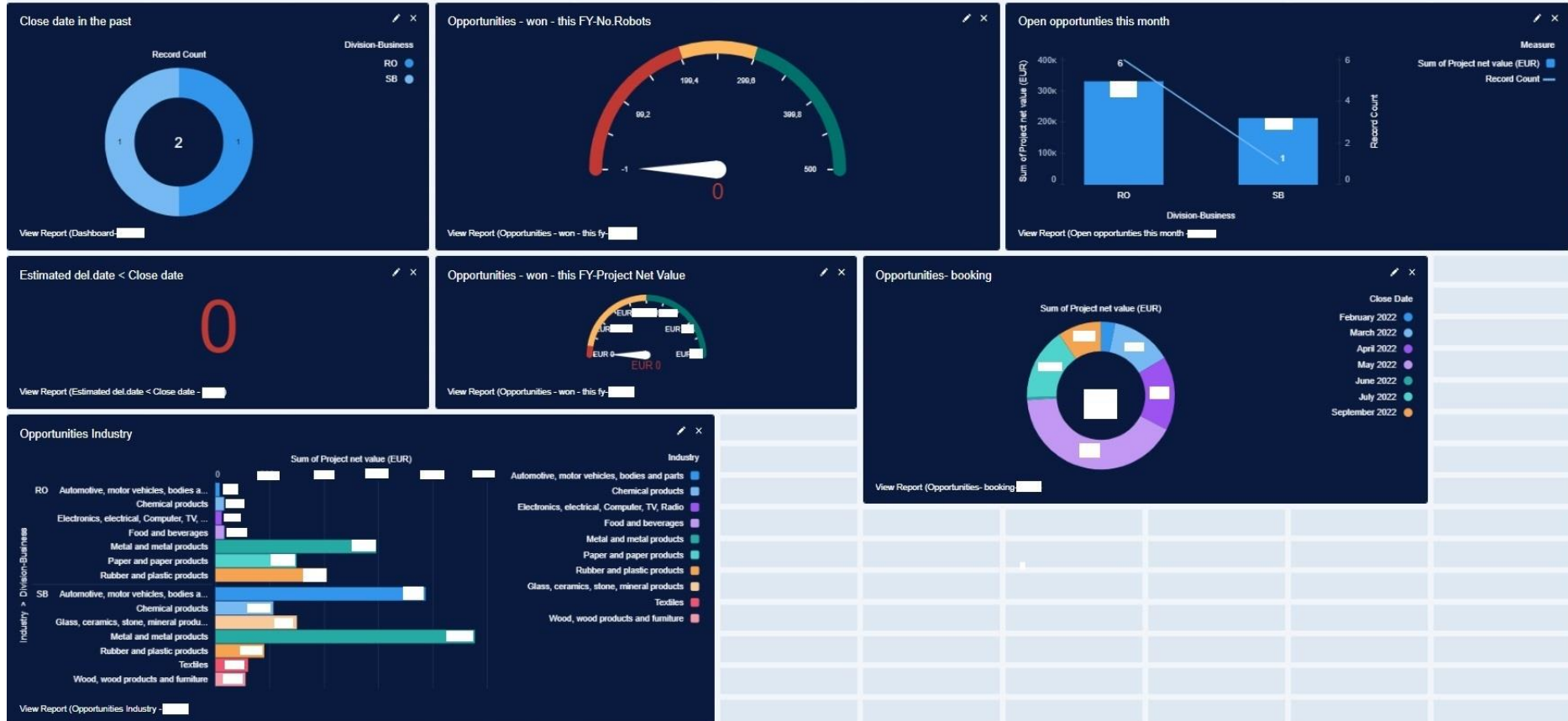
Appendix 3: Interview

Dear,

I would like to conduct a short interview regarding **the improvements that were made in Salesforce**. As a sales engineer, you are one of the users relying more regularly on the Salesforce tool; therefore, I would like to ask if you could please answer all questions honestly. Your answers will be used exclusively for research purposes in my master thesis as well for further improvements in the Salesforce platform.

I thank you in advance for your time and answers!

1. What is your age?

Sales engineer 1: 30 years

Sales engineer 2: 31 years

Sales engineer 3: 46 years

Sales engineer 4: 46 years

The management: 51 years

2. How long have you been using Salesforce in Yaskawa Slovenija?

Sales engineer 1: I am quite a new user, so I have only been using it for less than half a year.

Sales engineer 2: I have used Salesforce ever since I was first employed here, which was four years ago.

Sales engineer 3: Salesforce was implemented in our company in the very beginning. I believe this was in 2013 or 2014.

Sales engineer 4: I have used it ever since I became employed at Yaskawa.

The management: I have held a license for Salesforce ever since it was implemented in our company in 2013, but I never really used the Salesforce tool and filled out the information because this was a task for the sales engineers.

3. Had you used Salesforce at any time before your employment in Yaskawa Slovenija?
   If so, please provide information for how long.

Sales engineer 1: No.

Sales engineer 2: No. I also first met with the meaning of CRM in our company.

Sales engineer 3: No. In our company was the first time.

Sales engineer 4: No, not that I would be aware of.

The management: I have never worked with Salesforce before, but I used another CRM platform, which was internally developed for the needs of the company, and I believe it was called Galaxy.

4. How often do you use Salesforce?

Sales engineer 1: About twice per week. This is mostly when I send offers; right after, I put the information in Salesforce so that I do not forget something.

Sales engineer 2: I use it every day because I regularly check the close dates for my opportunities. But, when talking about real-time data entry, I put the information about contacts or opportunities for a week or two behind.

Sales engineer 3: I use it daily since I fill in any information regarding opportunities, and I use it to search for customer emails and phone numbers.

Sales engineer 4: I use it every time I need to save an opportunity or search for a contact.

The management: Until the newly-created dashboards, I only opened Salesforce a couple of times per month. Now, I monitor the data every day.

5. What struggles and challenges did you have when using Salesforce before the improvements?

Sales engineer 1: Since I am a beginner, I have had quite a few problems with getting used to Salesforce and using even the basic functions.

Sales engineer 2: I often have opportunities with the close date being set in the past, and in addition, I sometimes made a mistake and set the estimated delivery date before the close date. Usually, I did not know what to choose for Industry with opportunities if I did not have the information from customer, which is why I started to save the information in Salesforce a couple of weeks later. Also, I have often struggled because I cannot decide where to save Notes – in opportunities or accounts.

Sales engineer 3: Mostly, I've had problems with past close dates in opportunities and finding the right opportunity in Salesforce for the offer which was saved in the server. Also, I have sometimes created duplicates of which I was not aware, which the Power User informed me of.

Sales engineer 4: Close dates in the past and estimated delivery dates before Close dates, for which the Power User informed me.

The management: Since I did not use Salesforce as often as others, I did not have any problems with it, but I was regularly informed about missing information, close dates in the past, opportunities with having several system integrators for the same project, and so on.

6. What struggles and challenges have you when using Salesforce after improvements?

Sales engineer 1: For me, it has no effect since I was not even aware of the problems. I believe I can adapt to new improvements more quickly than the others, who are used to some old habits of using Salesforce.

Sales engineer 2: I have fewer close dates in the past and estimated delivery dates being before the close date.

Sales engineer 3: I have the same challenges as I had before.

Sales engineer 4: Fewer close dates in the past, missing fields, and duplicates.

The management: Salesforce is now more useful for the management, which was also a goal. I can directly see the work of my sales team without losing time on meetings. The created dashboard has made me use Salesforce daily.

7. Please evaluate the following sub-questions after the made improvements in Salesforce:

	I strongly disagree	I disagree	I neither agree nor disagree	I agree	I strongly agree
Fewer missing fields				Sales engineer 3,4, Management	Sales engineer 1, 2
Fewer duplicates			Sales engineer 1	Sales engineer 2, 3, management	Sales engineer 4
Fewer close dates in the past					Sales engineer 1, 2, 3, 4, management
Faster to find information			Sales engineer 2	Sales engineer 1, 3, 4	Management
Better overview of information				Sales engineer 3, 4	Sales engineer 1,2, management
Better leadership management			Sales engineer 3	Sales engineer 1,2, 4, management	

More time for other things		Sales engineer 1,2,4		Sales engineer 3	Management

8. After the improvements, are you using any other software, besides Salesforce, to collect information regarding customers, offers, etc.?

Sales engineer 1: No, and I also did not use any before.

Sales engineer 2: For now, I am still keeping the data in an Excel sheet, as before, but less and less. The reason why I am still using it is that I usually write down some remarks for myself.

Sales engineer 3: Yes, I still use Excel.

Sales engineer 4: No, I did not use anything before.

The management: No.

9. Do you have any suggestions for further improvements?

Sales engineer 3: I would suggest a new, non-defined field where I could save my remarks and any information the customer shared so that I do not have to save it in notes. Also, the same notes would be seen as well in opportunities and accounts.

The management: Through time, we will see if we m need new indicators in the dashboards or other new implementations.