

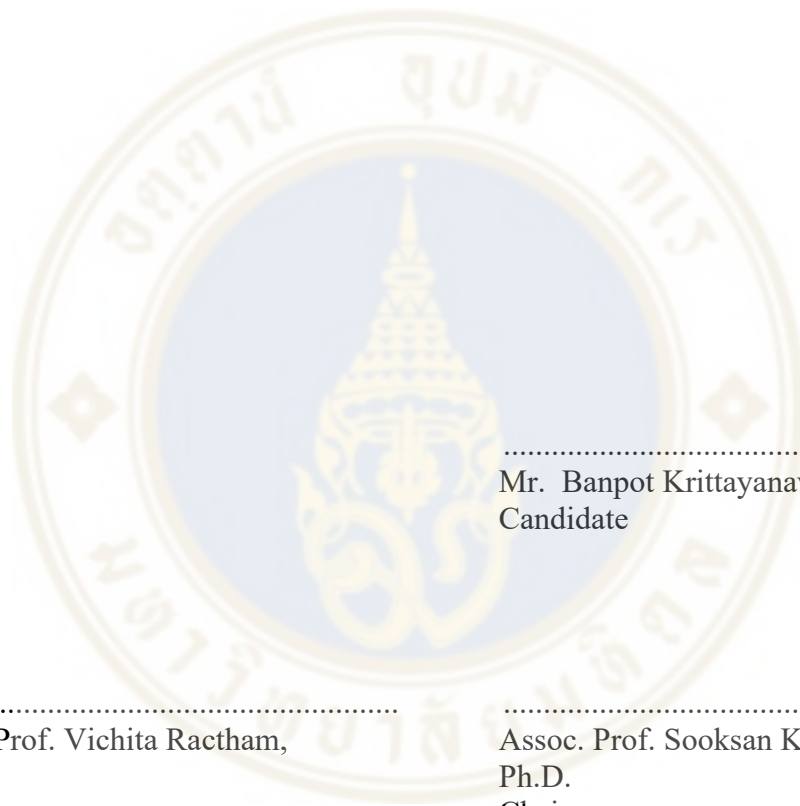
**EXPLORE THE RELATIONSHIP BETWEEN CRM FEATURES
AND SALE PERFORMANCE**



**A THEMATIC PAPER SUBMITTED IN PARTIAL
FULFILLMENT OF THE REQUIREMENTS FOR
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EXPLORE THE RELATIONSHIP BETWEEN CRM FEATURES AND SALE PERFORMANCE

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ABSTRACT

The purpose is to explore the relationship between CRM features and sale performance. The interviewees are related to sale function in various company being familiar with CRM technology.

The result of this research is to find which feature of CRM technology relates to salesperson. This research shows different perspective of CRM software obtaining from different salespersons.

KEY WORDS: CRM/ Salesperson/ Knowledge Management/ Technology/ Software

33 pages

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CHAPTER I

INTRODUCTION

1.1 Research Background

Salesperson is the one who generates profit of company. CRM technology has been employed to facilitate salesperson. CRM technology has a role in business such as contact management, creating proposal and scheduling, generating sales plan and geographic route planning.

Customer Relationship management (CRM) is platform to collect data in order to produce holistic strategy to complete in business. Interaction with customer can be gained with data collection. Overview of customer data as recorded history will improve customer relationship in order to retention of customer and driving sale growth rate (Peppers et al, 2011). CRM consists of people, process and technology elements. When information of selling process is filled as input by salesperson. The data is recorded and analyzed by other function such as supply chain and marketing etc. CRM is used to store data about customer such as number of contacts, stages of selling and ongoing selling process by salesperson.

To retaining, growing and gaining of customer in market which is very necessary for company to create strategy. Information must be collected. Availability of information of own company and competitor will create advantage to penetrate and close sale (Sharma & Lambert,1991). In cooperate company, CRM is utilized to be monitored by headquarter of company. Standardized report on selling process and sale forecasting is needed to be collected. Centralizing of CRM is provided in most cooperated company (Rodriguez et al, 2018).

Technology such as social media and cloud technology integrates with Customer Relationship Management (CRM) creating a business platform using in competitive market recently. Salesperson can access customer information and make use of information which is subjected to sales professional (Sinisalo et al, 2015). Customer's need and purchase pattern are necessity to increase the closing rate in

company. With need of customer, company can adopt marketing strategy tailoring to match with their needs. As salesperson will interact more effectively with customer through precise detail in CRM. (Anderson Consulting, 1998)

Adaptation of CRM is not only concerned with people, process, and technology. Culture difference should be taken into account in order to gain successful CRM. Degree of customer's relationship is different between each country. Collectivistic culture has high repetitive purchases. In turn, strong relationship is made (Iacobucci et al, 2003). CRM will create more work when strong relationship is established. Internal structure in company is a part of factor in order to implement CRM. Centralized structure makes decisions by parent company which standardization is provided. Decentralized creates autonomy in workflow. Sale activity and sale forecasting may lack of formality in procedure (Rodriguez et al, 2018). Consequence for using CRM technology has declared that there are many perceptions of using CRM technology as positive and negative one. Positive one believes that they can approach more business from this technology. In contrast, they believe that it takes too long to finish in a day for filling input. However, in cooperated culture, avoiding using CRM may affect in losing job as most of corporate company offer this technology to support business. Salesperson views it as it is compulsory to use CRM technology but not helping to close sale or simplify their own task. Most of company consider internal consequence more than external consequence as selling process (Senecal et al, 2007).

Salesperson or sales representative is individual who increase the profit of company and confront the customer. The salesperson has duty to develop customer relationship with CRM technology (Tanner Jr et al, 2005). Throughout CRM technology, customer life cycle has been viewed to estimate the date of approach the sale.

To be successful salesperson, selling process is categorized as call productivity, knowledge, targeting skill and sale presentation skill (Ahearne et al, 2006). Moreover, need of customer must be met in order to deliver to solve customer's problem. Retaining, growing and gaining in business can be successful by following up the customer process (Åge, 2011). Relationship with customer is categorized into four stages as initiating customer relationships, developing customer relationships, and

enhancing customer relationships (Ingram et al, 2012). This process is called “Trust-based selling process.

In Thailand, Relationship with customer is key to close the sale. The research found that relationship marketing is based on trust. (Chattananon & Trimetsoontorn, 2009). Most of manager stated that time must be considered to create long term relationship with customer in Thailand. To build trust, image of company must be considered. When competitor offers same price, Image of company is next procedure to be compared.

1.2 Research Objective

CRM has played important role to improve the business as customer satisfaction meanwhile building trust and image. To state main feature of CRM technology as Document Storage, Email Marketing, Internal Chat Integration, Lead Scoring, Marketing Automation Integration, Mobile Access, Quotes/Proposals, Segmentation, Social Media Integration, Task Management and Territory Management. These features are used internally in company. There is the gap between these features which can facilitate the closing sale. Implement of CRM is concerned with culture, willingness and adoption. To fill the gap in the literature, objective of this research is to find the relationship between CRM features and sale performance.

1.3 Scope of this research

To achieve these objectives, qualitative investigation is carried out by interviewing skilled salesperson with high experience in selling and confronting many customers. At the same time, these salespersons have utilized CRM technology as usual. Difficulties in use of this technology will identify the new way of CRM technology to improve the business in long term direction.

CHAPTER II

LITERATURE REVIEW

CRM technology is widely used in B2B and B2C business. However, there are features which facilitate salesperson directly and indirectly. In marketing respect, it simplifies to acquire salesperson to closing stages of selling process. Classification of CRM software is shown down below.

Table 2.1 Function and CRM Software

| NO | Function | CRM Software | | | | |
|----|----------------------------------|--------------|------------|------------|-----------|-------------------|
| | | Zoho CRM | Salesforce | SAP Hybrid | Veeva CRM | Oracle Sale Cloud |
| 1 | Calendar/Reminder System | ✓ | ✓ | | | |
| 2 | Document Storage | ✓ | ✓ | | ✓ | |
| 3 | Email Marketing | ✓ | ✓ | | | |
| 4 | Internal Chat Integration | ✓ | ✓ | | | |
| 5 | Lead Scoring | ✓ | ✓ | | | |
| 6 | Marketing Automation Integration | ✓ | | | | |
| 7 | Mobile Access | ✓ | ✓ | ✓ | | ✓ |
| 8 | Quotes/Proposals | ✓ | ✓ | | | ✓ |
| 9 | Segmentation | ✓ | ✓ | | | |
| 10 | Social Media Integration | ✓ | ✓ | ✓ | | |
| 11 | Task Management | ✓ | ✓ | | | |
| 12 | Territory Management | ✓ | ✓ | ✓ | ✓ | |

Each CRM software has different capabilities depending on organization needs. Currently, CRM has been a part of social media and marketing. This paper is to analyze the effect of CRM feature on salesperson. Therefore, social media integration is excluded from this literature review. Each feature is explained below with journal and research.

2.1 Calendar/Reminder System

Salesperson can respond customer quickly. Speed is one of factor that can success in selling. Calendar/Reminder systems will guide the date to contact customer. CRM has ability to simplify time management. CRM technology allows salesperson to manage relationship with more customer simultaneously. However, salesperson may

lose time for personal contact with each customer. Personal and emotional feeling in relationship become less and it is subjected to show product and price to customer in selling process. Emotional side is attached in selling. Selling which is based on trust is ignored. (Jaakko et al, 2015). Reminder systems will create salesforce more supervising to sales manager. Therefore, this feature increase call productivity of salesperson because sales manager has direct control over sales activities. (Singh & Koshy, 2010). Date to contact customer or prospect would be marked based on stage of selling process. Salesperson can be aware of time and activities to formulate selling strategy to each customer or prospect. (Kumar & Reinartz, 2006)

P1. Calendar/Reminder System feature increase speed in selling process and call productivity but customer's trust is neglected. However, date can be specified to approach sale at proper time.

2.2 Document Data Storage

CRM has structured format which allows salesperson to record detail of customer such as Name, contact number of key persons, Stages of selling process with date, Minutes of selling meeting with customer and sale amount of product. In turn, history of sale activity is shown which allows salesperson to review the potential of purchase. Document Data Storage is related to customer life cycle. How to engage sale with understanding of customer business driver and implement solution delivering to customer is called "customer life cycle" (Greenberg,2004). Customer relationship become strong due to sale activity which response to the need of customer facilitating in selling achievement. Salesperson can access data of customer in order to approach making relationship to prospect. Targeting customer probably can be developed via understanding customer profile leading to closing sale in selling stage. Action plan will be formed via this information in document data storage. (Weitz et al,1986)

P2. Document Data Storage feature facilitates salesperson to identify action plan and time to contact to approach sales with activity. In turn, Customer relationship is increased.

2.3 Email Marketing

Salesperson tends to send product description and detail via email. However, CRM contains updated data of customer. Marketer can create communication matching with customer preference. Empowerment from email marketing results in sales increased, loyalty and customer lifetime value (Hartemo,2016). The email enhances relationship with customer. With the help of message retrieved from preference of customer will simplify in selling process (Leung & Tsou, 2019). Most of email marketing is executed in B2C business such as hotel industry or retailing industry in order to keep updating their product or service for customer.

P3. Email Marketing feature improves loyalty of customer via key message to persuade in purchasing of product or service.

2.4 Internal Chat Integration

Feed chat is included in this feature. Internal stakeholder can post knowledge forum on the feed wall. Centralization of knowledge is done in one location and be displayed to all concerned staff. Sharing some knowledge on feed wall will make new idea for salesperson to approach the customer. Salesperson can enhance performance effectively if salesperson understand situation in the market along with knowledge of product. Making use of market information will encourage salesperson to acquire more sales (Bon & Merunka, 2006). Knowledge of product can be posted in feed of internal chat organization. However, when knowledge of salesperson is increased, the better of selling conversation. Strategies of selling can be rapidly changed to situation which increase agility of salesperson (Chonko et al, 2013).

P4. Knowledge of product can be seen via Internal Chat Integration feature. Salesperson can make use of this knowledge in selling process.

2.5 Lead Scoring

Targeting customers might be hard to be identified. High potential customer is required in order to close sales. Criteria can be set to prioritize leads by scoring.

Criteria such as annual revenue or kind of industry might be one of criteria corresponding to market. This allows salesperson reaching closer to prospect and fast closing sales. Aberdeen Research stated that company which has proper lead scoring. Using technology CRM score lead, only 50% of lead is efficient for salesperson to carry out (Aberdeen,2008). Contacting prospect from lead by following which estimate to have 5% in successful selling (Smith et al, 2006).

P5. Lead Scoring feature can identify potential to close sale depended on criteria given in CRM software.

2.6 Marketing Automation Integration

This feature allows marketers to track the status of email sending to customer. Capturing more leads with precise targeted customer will increase more sales faster. Prospect or customer who is interested in product will be engaged by salesperson. Salesperson can use knowledge in order to close sales with customer who pays attention to the product (Kotler,1994). Salesperson can identify the need of customer and tailor the package or valued added service as well.

P6. Marketing Automation Integration feature simplify selling process. targeted customer can be reached with proper product.

2.7 Mobile Access

Mobile access is suitable for salesperson who has traveled to meet prospect or customer. As internet is not accessible from computer only. Mobile CRM access the data of customer with real time. Click to call make it faster for salesperson to build relationship with customer more conveniently. To Implement this feature, the requirement of well-defined selling process and understanding of individual are needed. Communication must be set to align with goal of company provided to salesperson to communicate with customers. The benefit of this feature is to increase sale productivity and activity with internal and external stakeholder (Rodriguez & Trainor, 2015). With CRM technology, provision of data facilitates salesperson to customer's response faster

(Erffmeyer & Johnson,2001). Mobile access enhance ability of accessing data to salesperson.

P7. Mobile Access feature improve customer's response. As salesperson must travel to meet customer or prospect, this feature increase call productivity with the ease of use.

2.8 Quotes/Proposals

It allows salesperson to generate proposals automatically. However, this automate technology increases speed in selling process. Salesperson must have high agility to probe customer requirement. Data of customer will encourage agility of salesperson. Time deduction is requirement in entering competitive market (Chonko et al, 2013).

P8. Agility of salesperson can be increase via Quotes/Proposals feature. Saving time of salesperson is obtained.

2.9 Segmentation

In marketing, Segmentation is needed to identify kind of customer which response products. Nevertheless, Segmentation feature is executed by overviewing response from Email in CRM technology. All selling media such as website or email can be segmented to know the customer behavior. This feature can be used in B2C e-commerce retail business. By the research, segmentation of customer can generate an average 760% increase in revenues (DMA's National Client Email Survey, 2014). Different marketing strategy can be created and implemented to different customer (Peppers & Rogers, 2004).

P9. Segmentation feature can make different strategy in selling process on each type of customer.

2.10 Task Management

Dashboards is utilized for decision making. From design thinking, Dashboard can be a bridge between feasibility and viability as view for salesperson to monitor (Cahyadi & Prananto,2015). Nevertheless, Benefits of dashboard is more than self-monitoring. With performance shown in graphical dashboard can lead to precise decision making and root of problem solving. This dashboard can speed up the decision making to target customer with respect to own sale performance. On the other hand, Dashboard still lacks the way to view data in friendly and indicate the point where there is change in variable such as order rate (Laitinen,2012).

P10. Dashboard shown in Task Management feature can create competitive of selling which increase call number to customer.

2.11 Territory Management

Territory Management allows users to divide the extent of sale which facilitate to overview the sale in each area. Territory design is very important factor to salesperson's performance. To degree of workload in the territory, it may affect motivation of salesperson. If workload and market potential facilitate salesperson to be satisfactory, sales performance will be increased (Barker,2001). In territory, salesperson is assigned to contact with customer. Number of call productivity is increase. Call productivity is related to sales performance. As a result, when call productivity is increase as well as sale's performance (Ahearne et al, 2007). If territory design is well allocated, salesperson can lower the stress. Stress of salesperson has affected on sale's performance. Depersonalization from false customer relationship is subjected to sales outcome (Rangarajan et al, 2020).

P11.Territory assigned must support salesperson. However, this feature increase call number. Customer relationship is increased with proper design of territory given to salesperson.

As the features above which facilitates in selling process, CRM technology partially improve sale performance. To acquire successful sale performance, there are various skill which is the tool to confront customer from start to end of selling process. The skills are explained below.

2.12 Knowledge

The first importance in selling is to understand application of product along understanding of market situation (Behrman & Perreault, 1982). Key message delivers to convince customers with adaptation of knowledge of product.

2.13 Targeting Skill

Targeting skill is necessary skill for salesperson to analyze interest and potential of customer. Salesperson acquire some information in sales pipeline supporting to create action plan (Weitz et al, 1986). In B2B business, direct selling is concluded. Success of direct selling depends on targeting skill of salesperson. Although, Targeting skill inclines to marketing scope (Kotler, 1994).

2.14 Customer Relationship

Trust is basic of gaining business from another customer and prospect. Factor of willingly select and purchase of product is quality, price, exchange rate, and demand. Relationship with customer can have impact on purchase power (Lee et al, 2001)

2.15 Call Productivity

Salesperson deals with cold call which lead to make relationship with customer or prospect. The more of call productivity, the better the sale performance (Ahearne et al, 2007). To Initiate customer relationship, first call is very necessary.

2.16 Presentation Skill

To convey key message of product from stage of unknowing to stage of knowing. Presentation skill remove barriers of customer reaching to purchasing. Trust has been made if presentation is successful. Presentation is approach to understand need of prospect as person to person. Moreover, uncovering of issues that prevent selling can be obtained (Peterson & Smith, 1995).

2.17 Agility

Speed to response customer is subjected to close sale. Fast response can make trust with customer. Additionally, in competitive market, there will be challenging to serve customer against competitor. However, Agile salesperson is one of the skills needed in company in order to increase the sale rate (Chonko et al, 2013).

From this literature, summary can be done as shown in figure 1, CRM features are related to different respects of sale performance. Classification of each feature is made as shown down below.

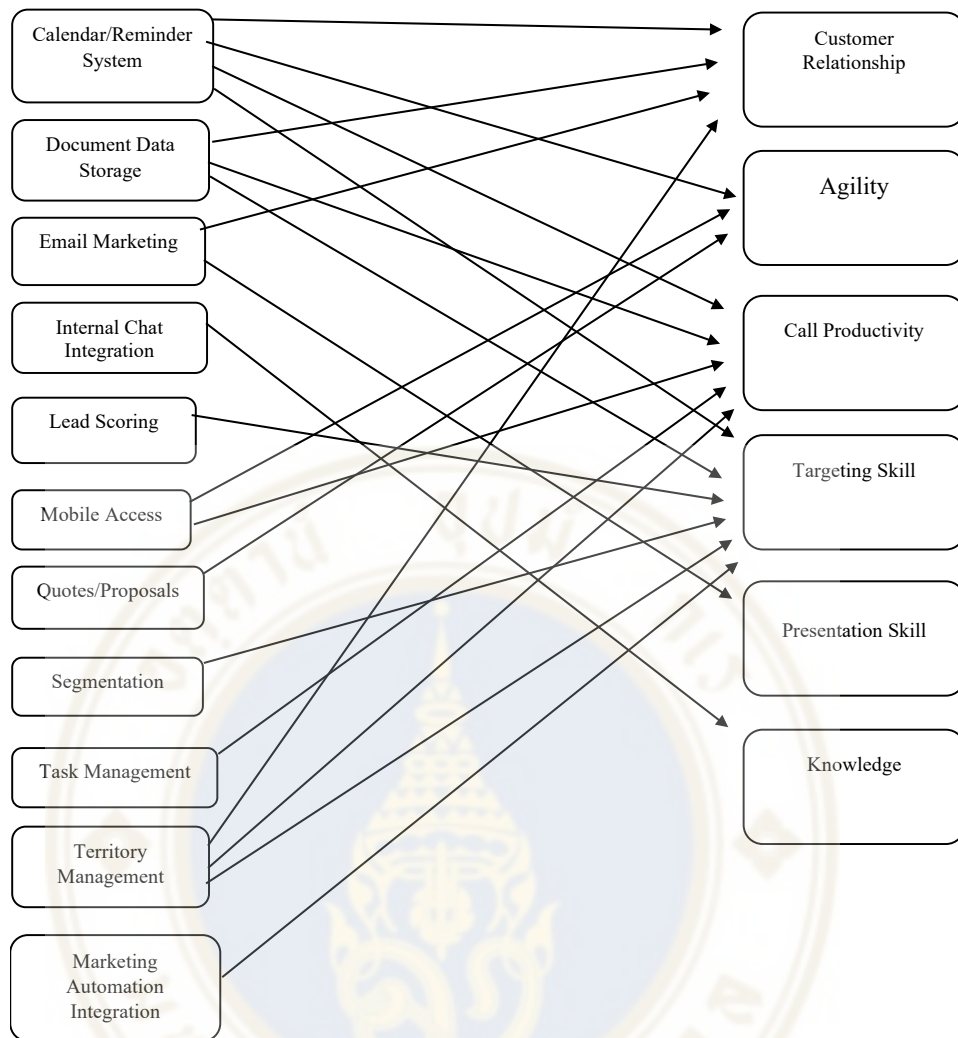


Figure 2.1 CRM features have relationship to sale performance

Therefore, qualitative investigation will be done to identify what feature creates benefit and disadvantage.

CHAPTER III

METHODOLOGY

3.1 Information collecting

This study relies in qualitative investigation to understand users or salespersons using CRM technology in selling process. Qualitative investigation is suitable method to deepen perspective of user who is salesperson and utilize CRM technology. This method can promote new data of research (Bowen,2009). As CRM is related to business management which needs competency as quality respects, qualitative method is necessary method to enhance addressing of utilization (Murphy,1995). CRM feature has affected on sale performance as shown in figure 2.

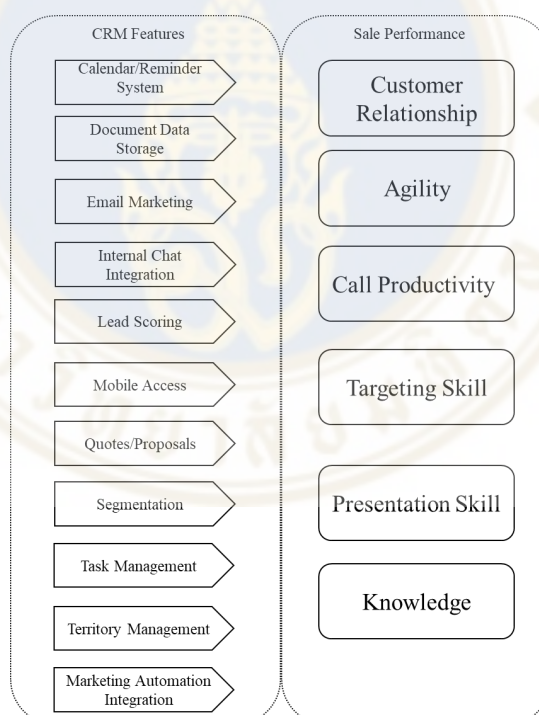


Figure 3.1 CRM features linked to sale performance

3.2 Question design

First round, question such as position, work experience and what industry that salesperson experience will be investigated as introduction. Second round, question which screens the users such as what CRM software they have used, feature that interviewee have experienced currently with CRM software. Picture of CRM software for each feature is shown in order to increase recognition and yield precise finding. Moreover, interviewee must state first three feature that can be thought of.

Third round, specified question is asked according to experience of salesperson from question in second round to be linked to each sale performance such as

- How Calendar/Reminder System in CRM work in approaching sale?
- How do you manage data retrieved from CRM software in selling process?
- E- Brochure that is created from marketing, how does key messages from E- brochure help you to close sale?
- How do you make use of knowledge seen in feed of CRM program?
- How effective does lead obtained from marketing help you to close sale?
- How does customer feel when you send quotation from automatically generating quotation systems?
- As salesperson has traveled all the time, how mobile access in CRM software help you in selling process?
- How marketing identifies segmentation of each product from CRM software?
- How does Dashboard drive you as salesperson?
- How do you response to territory assigned to you from CRM software?
- Marketing reduce scope of sale by analysis of tracking response from all media. How do you approach the prospect in next process?

3.3 Interviewee list

Table below shows interviewee with experience of working. Mostly they are sales executive, sales manager, marketing manager and related position with sale process.

Table 3.1 List of interviewees

| No. | Name | Industry | Position | Software | Experience (Years) |
|-----|------|----------------|-------------------------------|----------------|--------------------|
| 1 | Karn | IT | Senior Sale Executive | Zoho | 7 |
| 2 | Bud | IT | Account Executive III | Salesforce | 6 |
| 3 | Yok | Retailing | Online Merchandising Manager | Salesforce | 11 |
| 4 | Fine | Pharmaceutical | Medical Representative | Veeva | 5 |
| 5 | Mew | Pharmaceutical | Medical Science Liaison | I-Connect | 5 |
| 6 | Mark | Pharmaceutical | Product manager | Oracle and FSE | 3 |
| 7 | Paul | Petrochemical | Territory Manger | SAP | 6 |
| 8 | Ploy | Pharmaceutical | Medical Sales Representative2 | Veeva | 5 |
| 9 | Num | Retailing | E-Commerce Marketing Manager | Salesforce | 9 |
| 10 | Dear | IT | General Manger | Zoho | 20 |
| 11 | Poon | IT | Account Manager | Salesforce | 6 |
| 12 | Pui | IT | Sale Manager | Zoho | 7 |
| 13 | Tai | IT | Business Development Manager | Ssim 2 | 8 |
| 14 | Pond | Pharmaceutical | Product Specialist | MI | 6 |

Table 3.1 List of interviewees (cont.)

| No. | Name | Industry | Position | Software | Experience (Years) |
|-----|------|----------------|------------------------------|------------|--------------------|
| 15 | Kung | IT | Sale Executive | Zoho | 4 |
| 16 | Bas | IT | Account Executive | Salesforce | 4 |
| 17 | Fah | Pharmaceutical | Medical Representative | Veeva | 3 |
| 18 | Fern | Petrochemical | Account Manager | Salesforce | 6 |
| 19 | Oui | IT | Account Manager | Salesforce | 10 |
| 20 | Nut | Chemical | Sale Development Manager | Salesforce | 4 |
| 21 | Pear | Chemical | District Manager | Salesforce | 8 |
| 22 | Pim | Pharmaceutical | Medical Sales Representative | Veeva | 3 |
| 23 | Pin | IT | Sale Manager | Zoho | 15 |
| 24 | Tay | IT | Sale Executive | Zoho | 5 |
| 25 | Joe | Chemical | Sale Development Manager | Salesforce | 6 |

CHAPTER IV

DATA ANALYSIS

Qualitative investigation is carried out based on 25 salespersons. Each salesperson has differently experience with CRM technology. Data Analysis is shown below.

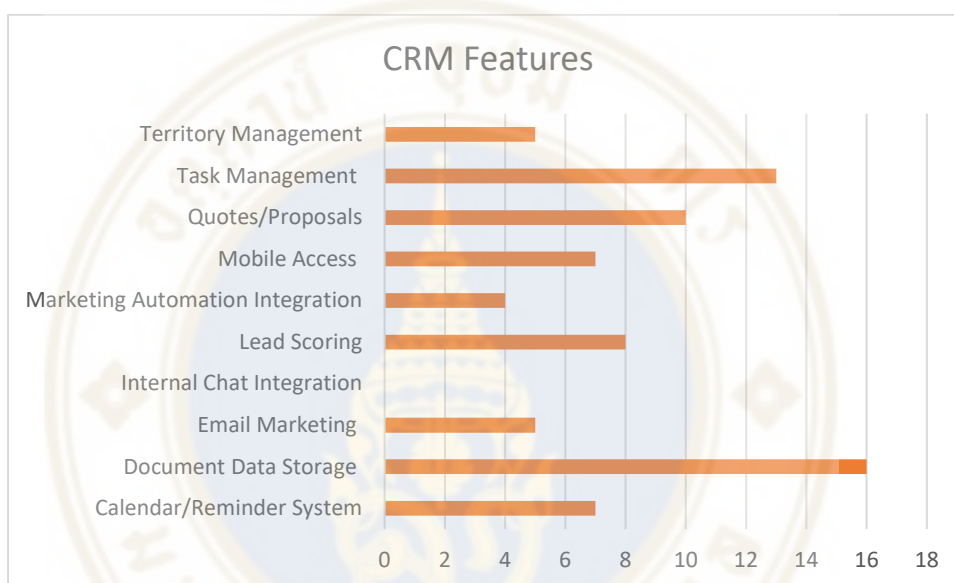


Figure 4.1 The first three features of salesperson

Different salesperson has recognized each feature differently. Most of the feature is Document Data Storage that salesperson has recognized as main function of CRM technology. Second is Task management as selling dashboard must be checked as duty of salesperson. Quotes/Proposals has come as third feature due to salesperson must submit quotation to customer very often. More detail of each feature is shown down below.

4.1 Calendar/Reminder System

Most of all interviewee said that Calendar/Reminder System is capable of time management. It simplifies tasks of salesperson. Chance to close sale is not related to this feature significantly. For example, investigation from interviewee in pharmaceutical. As this feature allows user to record of visiting each customer, this can enhance customer relationship as user can track previous action in order to plan next action for next visit.

Participant 1: “Actually, the system provides this feature for medical rep, but we don't use it that much. Normally, we record it after visiting the customer. We don't use it for planning in advance. It helps me only for time management not for closing the sale.”

Agility is not defined in this feature. This feature indirectly simplifies the task.

Participant 2 – “It organizes time effectively. See activity monthly. It indirectly helps us to focus in selling respect as it organizes the other work.”

This feature can produce more call productivity compared to high potential of customer. If there is high potential, productivity of that customer should be more.

Participant 3 – “It reminds me to see potential of customer and plan how many times I should visit. This CRM is not main thing to close sale. If there is not this program, I can still do the task.”

Targeting customer is main key to increase sale. High potential of customer can fill the gap to achieve sale target at each month.

Participant 4 - “Because there are many customers we have to visit. It is a part to gain sale. It allows me to focus the potential customer in order to reach sale target in the month.”

Nevertheless, this feature can be no use because organization is not familiar with monitoring activity of salesperson via CRM technology. Outlook which is email software that most of organization employ it.

Participant 5 - “It is no use. I use in outlook as it can be monitored by my boss.”

This feature benefits salesperson in such way that salesperson can realize the time to approach the customer or prospect. Selling strategy could be made before

visiting customer as Kumar and Reinartz mentioned. In turn, each selling strategy can enhance relationship afterward. However, this feature enhances time management of salesperson indirectly. On the other hand, Call productivity could be more produced according to Singh and Koshy mentioned. Downside of this feature is that organization does not utilize this feature in CRM software as Outlook can be more easily visible.

4.2 Document Data Storage

Document Data storage is huge convenience for salesperson in order to contact customer. Although, this feature allows salesperson to contact proper customer who has high potential in purchasing. This feature is not related to closing sale. Salesperson must visit customer on their own to close sale. Moreover, Data of customer can make use for selling process as shown down below.

Participant 1 – “Look at selling data of each customer based on season. For example, raining season, product with inner wear is more response. Forecast will be higher. Moreover, Location is a factor in selling. Some product must be matched with location. This feature is especially useful, but it needs to look at it as interface is not friendly.”

Participant 2 - “Data helps me to engage the doctor with their specialty. Communication can be shaped to approach the customer with particular specialty.”

Relationship with customer can be increased as this feature enable salesperson to contact customer time to time. Also, call productivity is increased as well.

Participant 3 - “Make use of data to call and send invitation or update product. It helps me only 10% closing sale. “

On the other hand, Data can allow salesperson to focus on sale potential for each customer. Targeting skill can be enhanced with the help of CRM technology.

Participant 4 - “Data can be used to focus the customer with class A (high potential). Chance to increase sale is more than Class C.”

Some salesperson is not aware of benefit of CRM software. Some data can be viewed in CRM in order to contact customer only and create some task to be checked with higher position person.

Participant 5 - “It does not help me in selling process. It can be viewed only to contact customer”

Participant 6 - “Data retrieved from program is to turn the data for talking with salesperson. It depends on input that salesperson fill it. Attitude to this software is just for recording to have some task viewed by manager.”

As Greenberg said, this feature can be utilized to understand customer need and implement solution for customer. This feature can allow salesperson to see data of customer such as specialty of doctor in pharmaceutical selling field. Targeting customer can be more accurate as salesperson is aware of stock which customer buy in previous purchasing. This create some proof that Weitz has conducted the survey.

4.3 Email Marketing

This feature can facilitate salesperson to keep relationship with customer obtained from interviewees. Key message in E-brochure cannot make any progress in selling process. So, presentation skill of salesperson is not enhanced as evidence shown down below.

Participant 1 – “No use as customer is not response. Direct sale is better.”

Participant 2 - “It helps a little. Wording can response to customer, but it is not much.”

Participant 3 - “It induces customer to pay attention to our product. Keep us to maintain relationship. Relationship can close sale about 90%”

E-mail marketing results in increasing of customer relationship but not increasing in sale immediately. Sale can be gained afterward as same as Hartemo said. However, Key message in Email is not much benefit in closing sale which is contrast with Leung and Tsou.

4.4 Internal Chat Integration

Internal Chat Integration shows detail of product published within organization. Salesperson can apply knowledge shown in this feature to approach

customer. However, less salesperson makes use of this feature to increase knowledge skill.

Participant 1 - “Knowledge about the product is updated. Trend of product in global can be used to propose the customer.”

However, many organizations do not have this feature in CRM technology. Even there is this feature. Other software still overcome this internal chat in CRM.

Participant 2 - “Not using for chatting. We use only Line application on mobile.”

As Bon, Merunka and Chonko said, making use of market information can acquire more sale. This feature urges salesperson to increase knowledge skill in order to process selling.

4.5 Lead Scoring

Lead that is undergone from organization can be effective depends on criteria. Most of organization assign marketer to generate and grade lead. Targeting of prospect can be specified based on lead transferring to salesperson. Most of interviewees said that lead from marketer is not effective as marketer do not know selling process in real practice. The evidence is shown down below.

Participant 1 - “Lead is graded but it is not reliable as I contact customer. It turns out as customer does not response as grade generated from marketing department.”

Participant 2 - “Priority with high potential lead to pick the customer. It is 50% accurate grading. Marketer only know a bit of environmental but not in selling practice.”

According to Aberdeen as 50% of lead is subjected to successful selling probably is not true as marketer might not experience much in sale management. Smith stated that 5% in successful selling is probably depended on criteria and market environment for each country.

4.6 Marketing Automation Integration

Targeting customer can be easier and generate the sale by understanding kind of customer pay attention to which product. Salesperson can form proper communication via data of this feature.

Participant 1 - “For existing customer, we can see what product they like. After we know this data, we can use particular communication to talk to customer. Maybe they like another product. We can see this data as well and create new communication in selling process. Prospect can see what they like. If the customer or prospect do not really like, maybe we can cut customer out of our pipeline.”

This feature can be effective depended on analysis of user. Some organization probably has poor analysis on this feature.

Participant 2 - “It is a little accurate. It helps a little bit.”

Kotlor stated that customer pay attention to product. Salesperson can use knowledge of this data for selling. Salesperson can implement success selling as they know the needs and nature of customer. However, it is still depended on how effective of analysis in organization.

4.7 Mobile Access

Salesperson can see data and detail of product which can be shared to customer at the time of visit. It also enhances professionalism of salesperson. Additionally, Mobile access can be adapted to use in tablet to be portable every visit of business.

Participant 1 – “It looks professional and comfortable. Paper is not necessary to be carried anymore.”

Participant 2 – “We can check and register customer. We can see stage of selling in each customer. It’s a part to close sale.”

This feature can increase call productivity as location of salesperson visit must be checked and recorded.

Participant 3 - “Simplify the work but not helping to close sale. However, it records location that I travel. Check in is needed and recorded in this feature.”

However. Agility can be enhanced in order to response to customer.

Participant 4 - "I can make quotation via mobile. Agility is important skill for salesperson.

On the other hand, limitation of mobile access is not friendly interface. There is difficulty to see data at the time.

Participant 5 - "Hard to use for this function as there are many blocks needed to be filled. Dashboard cannot be shown."

As Rodriquez, Trainor, Erffmeyer and Johnson states that this feature increase sales productivity because this feature can response to customer quickly.

4.8 Quotes/Proposal

This feature reduces time for salesperson in order to generate quotation and proposal. Most of important factor in selling process is agility which salesperson benefits from this feature.

Participant 1 - "It is convenience and professional. With these, it makes us reliable in selling and increase customer satisfaction."

Participant 2 - "Like I do it in computer. If there is not this feature, it will slow me in selling process."

There is salesperson which does not gain benefit of this feature as there is need of approval from higher position in organization.

Participant 3 - "Actually, it's better to do myself not in program as it need approval from manager. It must send it after 2 second of business talk."

Time reduction is important requirement for salesperson to enter in competitive market like Chonko said. In Thailand, this feature has huge advantage for competitive market. There is disadvantage as approval is needed for quotation. This slow selling process for salesperson.

4.9 Task management

Task management allows salesperson to identify potential and urge salesperson to fulfill the pipeline and sales target.

Participant 1 - "Sale manager who monitors sale in dashboard, Manager tends to inform each salesperson. So, this feature alert each salesperson."

Participant 2 - "It helps me to identify what kind of customer that I can make more sale. It helps me to make sale more in industry that I make sale less."

In some organization, it is compulsory for higher position person to view the dashboard. Some salesperson gets stressed because higher manager must view the activity.

Participant 3 - "It does not drive me much. It only let manager viewing it. Just put only stages we are now with customer."

Participant 4 - "Boss can view the work that I do. Benefit is to contribution of my team does. Comparing between country and team in Thailand. It helps me a lot to compare another team in Thailand to keep up with other team."

Salesperson can see performance at glance which is same as Cahyadi & Prananto mentioned. This feature can urge salesperson to increase call productivity.

4.10 Territory Management

Territory Management enhance customer relationship, call productivity and targeting skill. By analyzing data in territory, salesperson can make use of data for selling process. Moreover, this feature can reduce conflict in organization in selling process. Customer Relationship can be enhanced as evidence below.

Participant 1 - "Actually, I look at every customer. However, salesperson does not like to change territory as they establish relationship already."

Participant 2 - "It allows me to make relationship. I had to visit customer from previous territory manager."

Salesperson can manage Call productivity without conflict with another salesperson.

Participant 3 - "To not conflict with other salespersons. Other might contact the customer already. I just check it when contact customer."

Targeting Skill can be focused with particular customer.

Participant 4 - "Data from Territory allows me to review and understand what customer is like."

However, there is no benefit for some salesperson.

Participant 5 - "If there is no CRM, I still have list of customers."

With no conflict in selling, call productivity is increased which proves same result as Ahearne. As no conflict between salesperson, stress can be reduced as well like Rangarajan stated in journal.

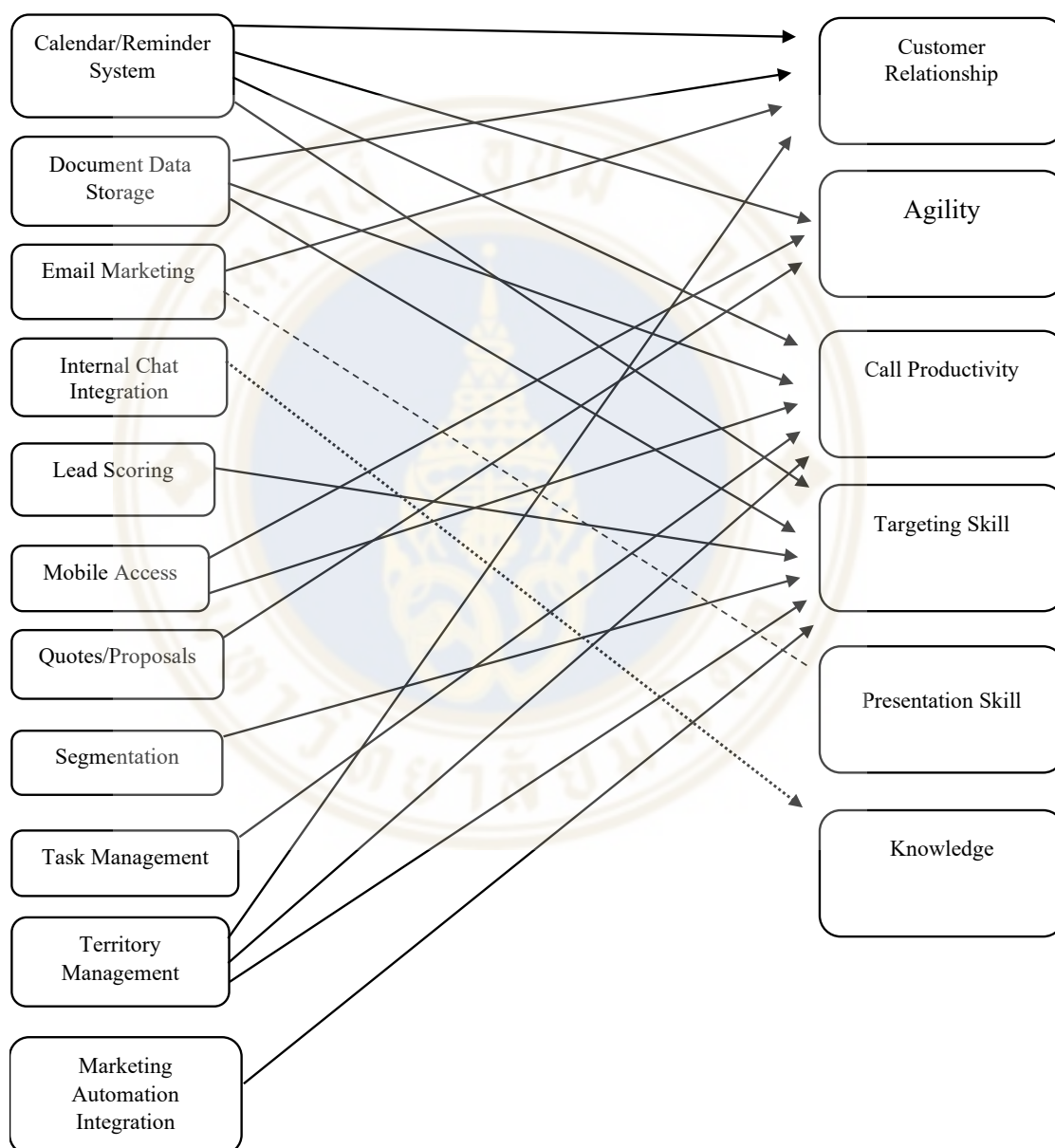


Figure 4.2 Result of CRM features have relationship to sale performance

CHAPTER V

CONCLUSION/RECOMMENDATION

5.1 Conclusion

The study indicates that there is impact of CRM features on salesperson in Thailand. The objective is unfolded as

- To find relationship between CRM technology and sale performance.

All CRM features have benefited to salesperson in all salesperson performance except Email Marketing which does not enhance presentation skill. For example, Calendar/Reminder System is time management for salesperson. This benefits salesperson in customer relationship, agility, call productivity and targeting skill. this feature can become no use as organization does not recognize. Feature of CRM is depended on organization system as well.

The most benefit feature in CRM is Document Data Storage. Salesperson can tailor selling strategy based on data of customer or prospect. In some organization, input data has been filled in order to allow higher position to view activity. This cause input data become poor.

Second is Task management as dashboard shown can drive salesperson to achieve their own sale target. This increase call productivity of salesperson. On the other hand, if input is not accurate, there must be unreliable result shown in dashboard. Salesperson cannot benefit this feature as much as it can.

Agility is considered to be necessary among salesperson. Quote/proposal has played important role for generating quotation. Submission of quotation can become fast and convenience. Customer can make decision faster as there is quotation in hand. However, organizational structure must be resilience. Some organization requires approval of quotation before submitting. This stall selling process for salesperson.

Internal Chat Integration is not much used for salesperson. There is more choice in communicating between internal stakeholder. Less salesperson focus knowledge displayed in feed of this feature and turn it into selling strategy.

5.2 Theoretical recommendation

To collect data and turn it into selling strategy, CRM technology has played important role for salesperson. There are various features in CRM software which increase Customer Relationship, Agility, Call Productivity and Targeting Skill. Presentation skill of salesperson has not gained from CRM feature which is linked to Email Marketing. Key message in Email Marketing does not enable in closing sale but maintain relationship with customer. Knowledge which is linked to Internal Chat Integration cannot be significantly enhanced. This research found that only one out of twenty-five salespersons apply this information shown in the feature and turn the information into selling strategy.

5.3 Managerial recommendation

CRM features has become compulsory for salesperson to handle selling process. Organization must provide training and point out the use of CRM. Every feature can benefit the most for salesperson. However, organization must allow freedom to salesperson for input. With tight organizational structure, Input in CRM technology become useless. This cannot turn input into any selling strategy.

Interface of feature partially affect salesperson. More complex in use of each feature can lead to poor use of CRM. There are a lot of input data to be filled in. As salesperson might not have data required to fill in CRM. This allows salesperson to probe more data from customer. In some point, this cause irritation of customer. Customer relationship can become worse due to more probing and disturbing.

Salesperson must focus on input data. Data must be precise in order to yield the benefit of CRM technology. Salesperson must understand how to turn this data into selling strategy. Mobile Access must include in CRM technology as salesperson can understand customer need everywhere. Moreover, Detail of product can transfer to customer more easily. Purchase decision can be faster.

5.4 Limitation & Further research

Based on this study has conducted several salespersons in different industries, this is subjected to different results as there is more factor to understand in particular industry such as selling environment, target customer and organization. Salesperson utilizes different CRM software that probably cause different opinion. Some feature probably is not the same in using of it. For example, Lead scoring which is mostly use by marketer or telesale. Lead can be graded with salesperson in pharmaceutical industry.

This paper can be made use to tailor CRM technology in order to collect data preciously for business. Salesperson is important person who faces customer and understand needs of customer. Organization can design the interface of CRM technology according to selling environment, target customer and organizational structure in such way that data collected is effective for yielding selling strategy.

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