Enterprise Resource Planning (ERP) Software-as-a-Service (SaaS) sales process, its characteristics and KPIs

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ABSTRACT:

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This thesis has a goal of researching how enterprise resource planning software is sold, when it is delivered through a software-as-a-service model. This is a unique model that has not been studied well and there is no clear definition for this sales process currently. This topic is answered through developing a clearly flowing sales process and by examining unique characteristics and key performance indicators of individual steps.

This sales process was established through ten qualitative individual interviews with industry professionals. These professionals were from three different departments: marketing, sales and customer service within a specific Finnish software company. The information was gathered in two separate parts, an anonymous questionnaire focusing on the interviewees first to establish context to the findings and then the actual face-to-face interviews afterwards.

By compiling the findings from the qualitative interviews, a clear ten step plan was discovered regarding how a company sells ERP SaaS. As this sales process is compared to Kotler & Keller’s traditional sales process, differences are found in the number of functions and their execution order. The most crucial step in selling ERP SaaS was discovered to be the convincing of the customer and establishment of the solution. In the future, this model will change due to new ways of delivering the products and this will place more emphasis on the development of product promoters and company credibility.
ABSTRACT IN FINNISH:

Tekijä: Petteri Rantamäki
Ohjaaja: Jyri Vilko
Tutkielman nimi: Software-as-a-Service (SaaS) toiminnanohjelmistoon myyntiprosessi, sen ominaispiirteet ja avaintulostin
Akateeminen yksikkö: LUT School of Business and Management
Koulutusohjelma: Kansainvälinen liiketoiminta
Avainsanat: SaaS, ERP, Software-as-a-Service, Myyntiprosessi, Myynti, KPI

Tämän kandidaatin tutkielman tavoitteena on tutkia, että kuinka yritys myy enterprise resource planning työkaluja, kun se toimitetaan software-as-a-service mallilla. Tämä on unikku tapa myydä, jota ei ole aiemmin tutkittu perusteellisesti eikä tällä hetkellä ole määriteltyä sen myyntiprosessille. Tähän aiheeseen vastataan rakentamalla selkeä virtaava myyntiprosessi ja tarkastelemalla unikkeja ominaispiirteitä ja key performance indicator lukuja.


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1. INTRODUCTION

This bachelor’s thesis is focused on discovering a clear sales process for Enterprise Resource Planning (ERP) Software-as-a-Service (SaaS) products. Emphasis is also put on discovering significant characteristics and key performance indicators (KPIs) for each stage of the sales process. The goal is to provide valuable and applicable information to a specific company and therefore the interviewee sample is stratified. Therefore, a goal of generalizing findings to a specially selected group within a population exists. Although it often is difficult to summarize and develop broad, general information from a company-specific case, general information to other parties for later utilization is proposed throughout the thesis. (Flyvbjerg, 2011)

By generating a clearly flowing sales process for these quite new types of products, I also challenge that the traditional process of selling products or services between companies doesn’t apply to SaaS ERP selling. Zhang, Niu and Fei (2013) stated, that SaaS is a completely new strategy of selling and it will spread quickly in the coming years. The trend of rising SaaS companies has been going on for a while also. A review provided by McKinsey exhibited that SaaS company revenues skyrocketed from 295 million USD in 2002 to 485 million USD in 2005. Another research stated that the whole enterprise software market is moving towards a pure SaaS model during the 2010s. (Zhang, Niu & Fei, 2013)

The development of the SaaS market contributes to several changes in the business environment. The dramatic development of technology during the recent decades has provided individuals and companies with reliable systems, secure environments and the transportation of data has become rapid. These contributors are enough to replace traditional, packaged software in enterprise management. (Zhang, Niu & Fei, 2013)

The company for whom this bachelor’s thesis is done is a Finnish software company, that provides other enterprises with different Software-as-a-Service solutions depending on their requirements and desires. These solutions provide customer companies with enterprise resource planning (ERP), budgeting, e-invoicing and supervision of work. The business
currently employs about 200 people in various functions with an annual turnover of almost 30 million euro in 2016.

1.1 Goals of the research
As stated in the beginning of the introduction chapter, the goal of this bachelor's thesis is to build a clearly flowing sales process for Software-as-a-Service (SaaS) ERP products and provide key performance indicators (KPIs) for each stage of the process. In the beginning the goal is to thoroughly inspect the traditionally understood sales process and then reflect that on this industry and company in particular.

By creating a clear process for sales, every member of the process understands their role and is aware of expectations placed on his or her actions. This way it is also easier to manage customer relationships, as each party is flagged as being in some precise section of the sales process. By being aware of the value and quality of a customer, a company is prepared to act in ways that drive the relationship towards a first purchase, generate upsales and/or build a better relationship. Various individuals who work with these processes and the processes themselves can and should be examined on a regular basis through KPIs. These numerical key performance indicators can show how efficient these processes are and what should be changed.

1.2 The research questions and restrictions
The research questions chosen for this thesis help to achieve the previously stated goals. The most essential part of generating these research questions is to specify, what kind of information is sought after in this thesis. These questions also determine what kind of information gathering is required in order to provide a reliable answer (Ronkainen & Karjalainen 2008, 31). Instead of finding the questions through theory, I sought to generate questions by observing the surrounding world, where one can detect phenomena that are fascinating and require further research. (Science Magazine, 2012) Through answering the main problem and a couple chosen side problems a clearly flowing process of selling SaaS ERP is generated.
The main research question:

How does an organization sell ERP Software-as-a-Service?

The sub-questions:

What are the steps involved in a modern ERP SaaS selling process and why?

What are the fundamental characteristics of an ERP SaaS sales process?

What are the significant key performance indicators in each step of the process?

The research is restricted to the direct sales process only. The findings are also very time bound, as the software industry and the process of selling is dynamic. The data for the research is gathered from professionals employed by the same company and combined afterwards into one process.

1.3 Research methods

The theoretical part of this bachelor’s thesis is built on top of currently existing research and literature on the basics of a sales process, the various functions within this process and its characteristics. This theoretical part in the beginning is focused on building a solid base for the understanding of the empirical part to come.

Research methods are required for the empirical part of this research. These methods are compiled of practices and operations that make it possible to distinguish findings from the gathered material. (Alasuutari 2011, 82) The empirical part of this research was completed through co-operation with the Finnish software company that was explained before in the introductive section. The data for this research was gathered through ten qualitative individual interviews with industry and process professionals. The platform chosen for conducting these qualitative interviews was Google Forms, a free and safe cloud service for collecting and organizing information within your Google account. (Google 2017)
Interviews as the research method was chosen because it is a straightforward way of gathering quality information from industry professionals. This in particular in this thesis, as the findings are company specific. A problem may appear as we ponder to what extent can the gathered interview material be trusted and relied upon. In order to tackle this problem, the data needs to be approved in one way or another. (Alasuutari 2011, 95) Before the actual interview was conducted, a questionnaire was sent to be answered a week beforehand. The goal of this questionnaire was to gather data about how the interviewee base is diverse and capable of answering the questions truthfully and accurately. These questionnaires were also anonymous. The questionnaire questions are listed at the end of the work, in Attachment 1. Questionnaire before the Interview.

The process of building an interview structure began by picking the major topics that provide valuable data to answer the research question. This was followed by generating smaller, more specific questions that answer smaller topics. After the interview structure was completed, an hour-long interview was booked for each of the ten individual interviewees. Ten interviews provide a good amount of information as when individuals are answering questions during an individual qualitative interview, they provide unique data for research compilation. (Alasuutari 2011, 151) The chosen questions for this research were distributed to the ten interviewees a couple days before the interview itself, so that they could prepare to answer. The interviews were conducted in meeting rooms of the company headquarters privately between me, the interviewer and the professional, the interviewee. The interviews were a dialogue that focused on the topics.

The interviewing questions were gone through one by one so that the interviewee answered the questions and the key findings were written into Google Forms for preservation and further analysis. After the ten interviews were conducted, the data was compiled and a SaaS sales process and its characteristics were established based on the gathered information. The interview topics and findings are further analyzed in the latter part of the bachelor’s thesis. The
The interview structure is in the attachments section at the end of the text labeled as Attachment 2. Interview. Both the questionnaires and the conducted interviews were done in Finnish language, because the interviewees were all native Finnish speakers. The answers may have varied greatly and the interviewing situation might have been uncomfortable, if they were not conducted in the interviewees’ mother language. The attachments (1 and 2) have been translated into English for this thesis. The nature of this thesis is to provide information to the specific company, so the interviews are restricted only into the company in order to investigate its unique processes and characteristics.

1.4 Theoretical framework

A specific perspective on analyzing gathered findings is defined within a theoretical framework of a thesis. The research demands some theoretical argumentation, that makes the empirical findings understandable and relevant to the thesis. (Alasuutari 2011, 82) For this thesis, the theoretical background is displayed through a simplistic image below.

![Theoretical framework of the thesis](image)

The point in this image depicting the framework for this thesis is to show, how the process of selling Software-as-a-Service is interconnected to the customer's journey of transformation from being a stranger into becoming a customer. Each section with its characteristics
throughout the journey is responsible for driving the sale with performance that can be inspected through KPIs on a regular basis.

1.5 Literature review
In the beginning of the research a literature review is in place. By skimming through previously completed research and inspecting related literature one gets a good platform to build a thesis on. To provide relevant information from literature to this thesis, I have inspected books and articles about building and managing a sales process.

John M. Coe (2003) states in his book that recently two big changes have made selling of products and services more difficult. First, a salesperson nowadays can’t be certain of the decision makers and influencers, their quality or their numbers. And secondly, the whole process of selling from first contact to a close has been extended and made more complex as new functions and individuals have entered the process. (John M. Coe 2003, 9)

When you look at Figure 2, one can examine how the sales and the buying processes are very different from each other. The sales process is viewed as a straightforward, efficient process with fewer steps and the buying process as a lengthy journey involving many influencers and many steps. (John M. Coe 2003, 10)
A disconnect between these two processes has been constantly growing and this clearly affects the sales results. Salespeople can attempt to speed up the relationship between these processes, seeking quick revenue in disregard of building a delighting customer journey. Attempted rushing of a purchase may also push the buyer to an uncomfortable situation, from which they will surely want to back down from. In order to avoid bad sales results, a company must align its sales process with the customer’s buying process. (John M. Coe 2003, 10)

But to be more specific about the steps involved in the general understanding of a sales process, I will offer Philip Kotler’s and Kevin Lane Keller’s (2012) six steps to a sales process.

These six steps have been accepted by the majority as required steps to an effective sales process. The process of selling begins as the marketing department attempts to generate qualified prospects for sales, then a pre-approach method is chosen and executed, the product

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**Figure 2. The differences between a sales cycle and a buying process**

**Figure 3. Six steps to a sales process**
or service is presented to the buyer, the buyer’s objections have to be overcome through offering insight and advantages of the purchase, the deal is closed or demolished, after which the customer relationship is maintained and nurtured. (Kotler & Keller 2012, 583) Each step will be gone through thoroughly later in chapter two of this thesis.

1.6 Definitions and concepts
In this chapter, crucial concepts and definitions that appear in this thesis are opened briefly one by one in order to avoid misunderstandings. This is done in order to build a solid base for understanding the following theoretical section and the empirical section.

A sales process - If a company really understands its customers and by being capable of solving problems that customers experience, it can define and develop a process with an idea of increasing the chance of closing a deal and generating revenue. The development of a functional sales process happens by doing and learning on the way, potentially leading a successful sales strategy. This is because a well-functioning process forces companies into being realistic, as it shows what chosen tactics work, what don’t and in what sections of the process the company needs improvements in. (Davies, 2010)

As stated in the previous literature review section, a classic and accepted dividing of the sales process is in chronological order: prospecting & qualifying, pre-approach, presentation & demonstration, overcoming objections, closing, follow-up and maintenance of reached customer relationship. (Kotler & Keller 2012, 583)

Direct sales - Selling of a product or service directly to the end user. (Isac & Isac, 2011) In this thesis the sales process is researched specifically from the company’s direct selling department’s perspective. This Finnish software company has divided its sales into two separate departments: Direct sales & Partner Office sales. In this thesis, direct sales does not
mean selling Software-as-a-Service solutions to individual consumers, but directly to end user businesses.

**Upsales** - Upselling is simply the act of trying to increase the spending of a current customer. Depending on the characteristics and past behavior of a current customer, a salesperson decides an approach that will likely generate an upsell, increasing revenue. (Harvard Business Review, 2012) In this thesis, an example of an upsell would be the upgrading of a current SaaS ERP user into integrating some extra service into their current package, slightly increasing their committed monthly recurring revenue (CMRR).

**Software-as-a-Service** - Better known as SaaS, is a revolutionary way of delivering software to end users. This product and selling type has reduced costs of services, made many business functions more efficient, implemented latest in technology to many businesses without a need for big investments and enabled a better concentration on core competences, accelerating innovation. (Vidhyalakshmi, Kumar 2017)

Software-as-a-Service delivery can be executed in various business functions: office software, human resource management (HRM), messaging, payroll processing, management, computer-aided design (CAD), accounting, customer relationship management (CRM), enterprise resource planning (ERP), invoicing and future implementation possibilities are endless.

SaaS can be characterized as an application with a common code set and data definitions. These are maintained by the providers, like the Finnish software company in this thesis, and used by multiple customers at any time. Payments for SaaS are usually handled with a pay-per-use model of subscription. Compared to the traditional on-premise software solutions, SaaS stands out with fast deployment, smaller costs, scalability, lower requirement for maintenance, automated upgrading and cross-device compatibility. (Vidhyalakshmi, Kumar 2017)
**Prospect** - A person or a business that is a potential buyer based on their buying authority, financial capacity and/or willingness to buy a specific product from a specific company. (Business Dictionary, 2017) At this stage nothing is purchased yet and a sales process is only about to begin - the prospect can become a lead.

**Lead** - A person or a company that has been identified as a potential customer because of gathered information. (Business Dictionary, 2017) This information that exhibits interest may come for example from clicks on specific calls-to-action on a company’s webpage, newsletters, emails or other means. If a lead is capable of executing or driving a purchase, they can become a buyer.

**Buyer** - In this thesis a buyer is defined as a person or a party within a company, that is capable of agreeing to acquire ownership, benefits or usage of a specific product or service in exchange for money or other chosen instrument of exchange. Buyers evaluate potential suppliers, negotiate new contracts and make sure that the product quality reaches a desired level. (United States Department of Labor, 2017)

**Key performance indicator** - KPIs are quantifiable measures that companies can use in order to observe their performance in varying lengths of periods. The chosen KPI metrics are used as guidelines that drive a company towards desired results. Key performance indicators can early on signal the positive and negative effects of taken actions, guiding companies to focus on what is working and discard disadvantageous actions. (The Balance, 2017)

KPIs are crucial in this thesis, because a sales process can and should be constantly evolved around its results. As the process has various steps within it with unique characteristics driven by various employees, constant measuring realistically illustrates what works and what simply doesn’t.
1.7 The structure of the thesis

The structure of this thesis follows the guidelines of a master’s thesis with its formalities. The thesis naturally begins by introducing the reader to the topic and research questions related to it. After the introductive section, theories about a sales process are provided. This theoretical section in the work is aiming towards explaining what a sales process is in theory, what steps are taken in it and why. After this section, the thesis moves to the research itself. This section begins by explaining the information gathering first by answering how the research was done, how was the data gathered and the specifics of the conducted interviews. After explaining how the data was gathered, the empirical section focuses on the findings. This is the most crucial part of the thesis as the interview data is gathered and analyzed to form a basis for answering the research questions. The thesis ends by concluding the findings and providing a couple proposals for future research around the topic. After the text part, one can find the list of references and mentioned attachments at the end of the work.
2. THEORY OF A SALES PROCESS
Earlier in the literature section of this thesis Philip Kotler and Kevin Lane Keller’s (2012) six steps to a sales process appeared for the first time. This will act as a platform on which the SaaS ERP sales process will be built later upon in this thesis. In this chapter, the steps are opened individually, opening the whole process of developing a consumer from the state of awareness towards a decision. After the theoretical section of going through the steps, the process of building a successful sales process by Stephen Davies (2010) is proposed.

Prospecting & Qualifying

Prospecting and qualifying is usually a responsibility of the marketing department. When consumers show interest through direct contact or actions on websites, the marketing department nurtures the lead to drive the sales further. In order to drive the prospect forward, marketing needs to track everything, respond quickly and offer value. (Forbes, 2012) As these prospects develop into leads, they are categorized based on the urgency or probability of the sale. If a prospect seems ready to buy, the prospect is directed to the sales team, otherwise the nurturing will continue. Kotler & Keller (2012) state that it should take about four direct
contacts to a prospect in order to generate a business transaction, meanwhile Matthew Cook (2017) in his post in Forbes states, that the optimal strategy at this point in time is between 8 to 12 contact attempts within 10 to 14 days. (Forbes, 2017)

2.2 Pre-approach
At this point the salesperson has received a prospect from marketing, that is qualified as a highly possible sale. Now the salesperson needs to address a few questions about the coming approach in order to be highly prepared to offer the right thing to the right person at the right time. Kotler & Keller (2012) propose, that a salesperson must know what the prospect needs, who takes part in the purchase decision making, who the buyers are based on their characteristics and purchasing processes.

By thoroughly understanding who is buying, what they are buying, when are they willing to buy, how do they want to buy and why would they buy, a salesperson is ready to conduct a direct contact with the prospect. Besides just understanding the prospects characteristics, it’s also crucial to know how they would like to be approached - email, direct phone call, personal visit, or some other way. (Kotler & Keller 2012, 583) This way the prospect can be contacted in a way that they feel comfortable, making a sale more probable. Depending on the scale of the potential sale, a client strategy should be placed in order to have a clear plan for driving the customer relationship towards a chosen direction.

2.3 Presentation & Demonstration
After the prospect has been directed to the sales team or a single salesperson and they have done their research about this prospect, it is time to contact them for the first time. Kotler & Keller (2012) state that a salesperson should use a FABV-approach, stating the features, advantages, benefits and value of the product they are offering. Features are characteristics of the product, like how safe the software is and advantages state how this product could improve the prospects company. Benefits state the economic, technical and social gains the company would get from this product and lastly, the value section of FABV brings actual numbers to the
Customizing such a personalized presentation to a prospect takes great effort and time but a well-prepared approach provides salespeople with confidence about their actions and helps them avoid undesired reactions to unfitting sales presentations. The goal during an approach is to generate a favorable first impression about the company and the product. The salesperson must make sure that the prospect truly is interested in the product and that they have their attention. The point of the demonstration in this step is to provide the customer with a better understanding of the concrete benefits they would receive from this product. (Manning & Reece 2007, 246)

2.4 Overcoming objections
It is very common that prospects pose objections during the stage of presenting and demonstrating the features, advantages, benefits and values provided by products. Kotler & Keller (2012) establish two types of resistance that generate objections at this stage: psychological and logical. Psychological resistance includes objections because of brands, reluctance to give up something, unpleasant associations with the company or the product, dislike of making decisions or neurotic attitudes towards money. Logical resistance sees objections that are built on the price, delivery or characteristics of the product.

In order to overcome objections, the salesperson has four steps to complete as stated by Mike Schultz in RAIN Group’s Sales Blog (2016):

I. **Listen to the Objection**

Instead of jumping straight in to tackle the objection, give the prospect time to state their objection fully. Objections should not be taken as comments that generate negative emotions,
because the salesperson might go into defensive mode and seem arrogant. Depending on the situation, a salesperson should communicate and confirm their understanding and listening of the objection through body language and speech.

II. Understand reasons for the Objection

Objections tend to have hidden issues that the prospect is incapable or unwilling of articulating. The salesperson’s task is to get to the core of the objection and understand the true source of it. This requires permission from the prospect to explore the issues more thoroughly and follow up with questions like “Why?” and “What else?” causes these objections. These two questions can eventually provide you with more information about the true source of the provided objection.

III. Respond accordingly and appropriately

The emerged objections must be prioritized and after enough information has been gathered and the salesperson feels confident to address these objections, it’s time to respond. This step should be completed as soon as possible, as speed is appreciated by the prospects and it exhibits professionalism and motivation towards the customer relationship. The more problems related to the objection a salesperson can solve in real time, the more likely the sales process is to go forward.

IV. Make sure that you answered and overcame the objection

After responding to all the objections the prospect has placed, it’s time to check if all the concerns have been satisfied. A salesperson must inquire if the prospect is happy with the solution or if they need a deeper answer. If the client doesn’t seem to be ready to commit to the purchase, they shouldn’t be pushed towards one. After all the objections are overcome for sure, it’s time to move closer to the sale.
2.5 Closing
The step in a sales process after getting a prospect from marketing, planning an approach, presenting and demonstrating the product and overcoming objections related to it, it’s time to reach a close. Close requires an agreement and an offer, that answers what the buyer wants and how they want it. Special offerings might be awarded in the closing stage, such as additional services, discount periods, extra quantity or gifts in order to streamline the final stage. (Kotler & Keller 2012, 583) This final step is the establishment of commitment between the selling and the buying party. Even though for the sales team this might be the final step in the process, it is only the beginning of a long-term partnership. (Manning & Reece 2007, 345)

2.6 Follow-up and maintenance
After the sale is completed, the customer satisfaction and repeating of sales must be achieved through following up and maintaining the relationship. Right after closing the purchase, the salesperson should provide information about the delivery, purchasing terms and other relevant matters to the purchase. Quick follow-up should be scheduled to make sure that everything has gone as planned and that the buyer is satisfied. At this stage in the sales process a maintenance and growth plan for this customer relationship should be developed to enable a high-quality relationship capable of developing upsales and references in the future. (Kotler & Keller 2012, 584)

At this stage, a company is encouraged to focus on customer relationship management, or CRM. CRM is about not focusing on the product that a company is selling, but generating a customer-focused approach in business in general. CRM is a crucial business philosophy for developing a company’s current customer-loyalty and overall company performance. (Hillebrand et al 2010, 595) CRM can provide companies with unique competitive advantages and by understanding the customer and staying updated about their dynamic behavior, it can turn prospective clients into loyal customers and recommenders of a company’s services. (Bhat & Darzi 2016, 403-404)
2.7 Building a sales process

A sales process should be unique in every organization, as the process reflects the company itself, its offering and its customers. If a company throughout its sales process fails to pass any step, the sales is typically lost and the customer might move towards a competitor. If a customer eventually comes back after a failed process, the operation should be started from the beginning as the conditions and requirements of the deal have altered. The process of building a sales process should always begin with a deep analysis that aims to understand what the customers want. A customer’s level of wanting something is usually determined by two factors: the need for this product or service or the capability of paying for it. These two components can be examined by simply communicating with the customers. (Davies, 2010)

After understanding its customers, a company needs to develop a solution that meets the requirements and exhibit it to its customers. This step confirms that the product or service is suitable and that the customer is willing to and has the ability to pay for it. After the development and exhibition, the company and the customer need to evaluate the offering - in this step the deals most commonly lead to a withdrawal, so a plan must be put in place. (Davies, 2010)

Listed below are some of the most common reasons for customer withdrawal:

- Inaccurate information presented by either the company or the customer.
- The customer doesn’t see the competence of the solution to fulfil its needs anymore.
- The selling company is not capable of introducing required changes to the solution in a timely or cost-effective manner.

Negotiations and contracts are a simple process if the evaluation of the offering has been clear and straightforward. In order to produce a convincing and accurate contract, some case-specific information must be mentioned: the implementation process, date, selling price with possible discounts or other modifications, warranties and maintenance costs. Davies (2010) proposes that the legal department should not be included in the process too soon, as this will very possibly stall the process and jeopardize the close. Only after all the specifics have been
decided, should the last formalities and legal investigations be completed by the legal department. (Davies, 2010)

After the contract is signed and the deal is closed, the sales process is coming to an end on the selling side of things, but the customer relationship management is only beginning. A long-lasting relationship is great for business, as it can potentially generate upsales and turn the customer into a recommender. A CRM plan should be established to keep customers satisfied, as getting a new customer typically costs over ten times more to sell to in comparison to an existing one. (Davies, 2010)

Next in this bachelor’s thesis is the empirical section. This latter half of the thesis explains how the information was gathered specifically for the findings that come after them. This empirical section is company specific, concluding the sales process with its characteristics and fundamental KPIs in each step within this company.
3. RESEARCH DESIGN

Ronkainen & Karjalainen (2008) state that the research questions should determine what kind of data needs to be gathered. For this topic, the data is narrow and unique, based on past experiences. The empirical section of this bachelor’s thesis is based on gathered information through ten face to face interviews with company professionals from different functions within the company. Interviews are a great way of gathering quality information for this thesis, as the findings are for and from a specific company with its unique characteristics and personnel. This process of gathering the data was completed through two separate rounds of inquiry, with the process shown in Figure 4. below. One week before the actual face to face interview took place, a quick anonymous questionnaire was conducted and then the interviews followed quickly. The third section of this thesis focuses on this data gathering before dwelling deeper into the findings. In the next chapter, the interviewee demographics are studied through questionnaire results with the interview specifics to follow.

![Figure 4. The information gathering process](image)

3.1 Pre-interview questionnaire

A smaller questionnaire was sent to the interviewees about a week before the actual face to face interviewing. The questions can be found within Attachment 1. Questionnaire before the Interview, at the end of the thesis. The point of this questionnaire was to provide demographics about the individuals and to bring reliability and context to the provided data. The questionnaire was structured to be simple and understandable, as it is crucial for every participant to understand the topics in a similar way to bring reliability to the gathered data. (Ronkainen & Karjalainen 2008, 36) The questionnaire didn’t have open answer questions - only multiple choice, numerical questions, linear scales, check boxes and a “free comments” section at the end.
A great majority of the interviewees answered the questionnaire, providing information about the interviewed sample. For qualitative research it is crucial, that information about the chosen sample is provided for context. (Ronkainen & Karjalainen, 72) As this first questionnaire was completed through Google Forms, the answers were immediately formed into graphs and other visual representations of gender, age, experience and knowledge distribution within the sample - these being examined in the next section.

3.2 The interviewees
Ten individuals were selected to this interviewing process from the Finnish software company. These individuals are employed in various tasks within the company and this sample is mostly divided into three categories consisting of marketing, sales and customer service employees. This sample was chosen, because they represent their functions well and carry their unique, function specific differences with them. These business functions are crucial players within the sales process and the interviewed people have an influential role within these functions. The goal for creating the sample was to make sure that the individuals have experience and knowledge on different fields, yet understand the whole process. Besides knowledge and experience, variance was sought in the distribution of age, gender and education of the interviewees to gather data from various perspectives.

The sample is distributed into 70% male employees and 30% female employees with their ages ranging between 28 years to 45 years of age. A great majority (60%) have their educational background in a university of applied sciences with the remaining minority consisting of university students or lower. The interviewees have good experience of working full-time, with 60% having over 12 years of working experience and the remaining 40% between 4 to 7 years of experience.
The Figure 5 pie chart depicts work experience within this company. The red area of 33.3% have between 1 to 3 years of work experience, the yellow area of 44.4% have between 4 to 7 years of work experience and the green segment of 22.2% have between 8 to 11 years of work experience within this Finnish software company.

As stated previously, the interviewees are mostly divided into groups of marketing, sales or customer service. In Figure 6, the blue and red areas depict sales, purple is customer service and green is marketing. From the marketing department, the director of marketing and marketing manager were interviewed, for sales the interviewees were a sales manager, director of channel sales, two product specialists and one senior product specialist. From customer service, the interviewed were two support managers and the director of customer service. Within this sample, only one interviewee claimed that they are not dealing with direct sales in their daily work, yet 100% claim that their work affects the direct sales process in some way.

Precisely half of the sample claim that they are not very familiar with the SaaS enterprise resource planning solution that is being sold and the other half thinks of themselves as proficient users. The individuals in this thesis are understandably very diverse regarding experience in sales, this one can see from Figure 7. as dark blue depicts no experience, yellow 1-3 years, green 4-7 years, purple 8-11 years and light blue over 12 years of experience in sales.
3.3 The interview
The interviews were conducted during four different working days in a timespan of a couple of weeks. The interviewees were booked through Google Calendar to take part in this face to face interview with a time slot of one hour. As stated previously in this thesis, the interview structure was sent to the interviewees beforehand and is exactly the same as Attachment 2. Interview, but in Finnish. All the interviews were conducted in the same closed meeting rooms with only the interviewee and the interviewer inside. The data from the interviews was majorly written down into Google Forms throughout the interview.

The interviewed individuals answered the questions willingly and the general attitude towards this research was positive. The atmosphere was open and the interviewees were encouraged to truthfully talk about the topic with guaranteed confidentiality. The interviews didn’t have any difficulties and the interviews flowed naturally without any problem of generating discussion. In the interviewing situation, individuals from sales were capable of giving great, practical information about the process, with marketing and customer service representatives providing a bigger picture of the whole process. By interviewing these different professionals, a solid, objective perspective was generated of the organization’s sales process.
4. FINDINGS

After conducting all of the ten individual interviews, the results were compiled into separate files, categorizing the gathered data into sales process steps, step-specific KPIs, unique characteristics and challenges. Through comparing the individual results, a ten-step-plan was established, which depicts the ideal way of selling the company’s Software-as-a-Service ERP system. These ten steps are shown as a flowing process below in Figure 8. SaaS ERP Sales Process. In this empirical section of this bachelor’s thesis these steps are explained individually with their characteristics, KPIs and challenges. Through opening the process one step at a time, a clear answer is proposed to the main research question regarding how a company sells and should sell SaaS ERP.

4.1 Lead Generation
The whole process of selling Software-as-a-Service enterprise resource planning solutions begins from lead generation which in general is a synonym for marketing. This first step within the sales process is quite understandably similar to Kotler & Keller’s first step: Prospecting &
Qualifying. This lead generation tends to happen most commonly through two different paths, internal or external generation.

Internal lead generation happens as the marketing department actively distributes material in social media and traditional media to generate knowledge about the company and spark interest in the offering amongst potential end users. This internal lead generation - marketing - pulls the customers to visit the company’s websites, download material or leave their mark through some other call-to-action. The first KPIs to follow are about how the lead heard of us and through what channels. Naturally the gross amount and potential value of the leads and effects of different campaigns on these need to be followed.

External lead generation tends to be a result of a previous successful, delighting sales process. Such a process generates satisfied customers that can become a company’s and its offerings promoters. A big challenge in ERP SaaS competition currently is to differentiate from competitors, as the systems offer very similar benefits and the pricing models are quite similar. Currently the most significant providers in this ERP SaaS market are Visma and Finago in Finland. In the lead generation step the company must stand out either through superior quality, better branding or more attractive marketing.

In the lead generation stage of the process, the challenge especially for marketing is to understand who the buyer personas are and what are the typical or ideal customer’s attributes. A clear understanding is also required about the typical problems that the buyer personas are encountering and how the company’s solution solves these issues. As enterprise resource planning SaaS has a wide variety of advantages that are very abstract, it is a challenge for marketing to distribute material that clearly depicts these advantages and is attractive. For example, a small business that employs only a couple people that are focusing on the businesses core strengths, investing in a ERP SaaS solution might seem expensive, as these individuals might not see their own time through monetary value. What they don’t see is the fact that through implementation this time without value could be used to something else, now that the ERP material is nearly automated. In lead generation, a prospect is generated when
understanding is reached in the fact that such a system gives a business and its employees more resources to channel to the core of the business.

If the lead generation is successful, the prospect leaves a sign of interest and the persona turns into a lead. These new leads are distributed rapidly from marketing department to the direct sales department, who are responsible for quickly moving the lead to the next step in the ERP SaaS sales process - contact.

4.2 Contact
The stage of contact has two ways of happening just like lead generation, either the lead contacts the company or the company’s direct sales department contacts the lead. According to the interviewee comments, a currently existing problem is that there is a vast amount of leads and each one of them should be handled with quality and uniqueness. This combined with the fact that a new lead should be approached soon after a signal of interest arises, generates a big workload for the direct sales team. According to Doug Davidoff - the founder and CEO of Imagine Business Development - an alarming 71% of new leads are never contacted and the average response time is simply too long with 46 hours and 53 minutes after signaling of interest from the lead (HubSpot, 2014). But by being aware of the existing situation, acting through best practices and through utilizing the best technology possible, companies could reach around 90% of their emerging leads (Forbes, 2012). Therefore a KPI to follow is how many prospects have been contacted of the whole crowd and how quickly.

The point of contact is where the relationship begins between the lead and the ERP SaaS selling company. This first contact is crucial in building a foundation for the process to build upon. In selling ERP SaaS, building a trusted relationship with the lead can be difficult. This is because there is a lack of face-to-face communication, as almost all communication is done through either phone calls or calls through other internet based calling services. The significance of the sale is a determining factor for physical meetings, if the potential sale is big, an actual meeting should be arranged.
The salesperson responsible for delivering the contact must have context regarding what the lead has downloaded, what articles they have read or what videos they have watched, for a dialogue can be established based on that. For example, if a lead has watched 2 videos with a keyword of invoicing, the salesperson can launch a discussion by calling about how the lead’s company is currently dealing with its invoicing and if they are experiencing any problems, that might be fixable. At this stage, a salesperson should not promote the company’s offering, but familiarize with the lead, build an open dialogue and provide fast value to the lead.

The next step of the process - Customer Analysis - can be carried out in the first contact if possible, or a later meeting could be booked for that. As it is the first point of contact, the lead can be quite reserved about discussing confidential business metrics and currently existing issues.

4.3 Customer Analysis
This is the third step within the sales process, where the lead is examined thoroughly. The goal is to honestly determine, whether the solution the company is providing is suitable for the lead and if the lead itself is suitable for the software company. The lead might not be suitable for example if they exhibit inertia towards automation or there is no understanding of the product ideology or value. The salesperson has a clear goal at this point of understanding the lead, driving the dialogue through empathy and professionalism. Every person involved in this step should exhibit great understanding of the product(s), basic business economics and the lead itself. One of the interviewees stated, that in ERP SaaS selling, it is more important to deeply understand the customer, their current situation, their future goals and desires in comparison to industrial selling, because the implementation of the software affects every person within the organization, altering processes and habits of the past. A thing to document here is how many of the contacts move to the customer analysis stage from the whole contact pool, as this is a clear signal if there are problems in the contact stage.
The main elements that require analysis are the problem that the lead is seeking to solve and current basic business metrics of the lead’s company. These basic metrics include revenue, number of employees and past growth for example. By discussing the problem, the salesperson is capable of deciding whether they are currently seeking the most ideal software for their problem or if there is a more suitable solution within the company or outside of it. At this point honesty is key, as selling software that is not the right fit can generate dissatisfaction and negative word-of-mouth in the long run. By guiding the lead to the correct solution early on, both the lead and the salesperson save time and the salesperson exhibits professionalism and empathy towards the lead, be the solution either within the company or outside of it.

During the customer analysis step of the sales process it is also crucial to find out who are the people who make the decisions in the lead company and how well they understand ERP SaaS and its benefits. There is potential that the lead is interested in the software but there is a disconnect of perceived value between the lead and the decision makers, canceling the process. A salesperson should also seek to understand what kind of results the lead seeks to achieve in what amount of time, if they are possible or if even better results could be reached. After the problems and basic metrics of the lead have been analyzed and understood, the process moves to the convincing and establishment step.

4.4 Convinging & Establishment
This fourth step within the ERP SaaS sales process is very crucial in generating a positive outcome and the step of convincing the lead was a topic that appeared in each interview. The interviewees stated how each group involved in the possible implementation of the software must be convinced and familiarized with the product. After the lead has been contacted and their current situation and future goals have been clarified, it’s time to convince the lead into becoming your customer and establish a solution for them. This step is the equivalent to “Overcoming Objections” step in Kotler and Keller’s classic sales process theory and unlike in that theory, in ERP SaaS sales process the customer must be convinced before and during the demonstration.
At this stage in the sales process we know what the lead desires and it’s time to start promoting the product itself. This will generate a variety of questions, which if answered correctly and rapidly, will convince the lead. As in ERP Software-as-a-Service system purchasing there are no big investments in implementation, the seriousness of the investment might be underestimated. It’s the salespersons responsibility to make sure that the lead understands the requirements of implementation and that they are motivated to carry the process. The salesperson needs to have great understanding of the complex ERP SaaS product and its features. This can be challenging, as the software is very dynamic, always being modified and developing into a more complex system. The software company really needs to make sure that the salespeople are up to date and the communication between developing the ERP SaaS and selling it is clear and systematic.

Information security has for a long time been a topic that has caused worries for stakeholders and these fears need to be removed. The user data must be highly secured and the lead must know about the current state of information security and reliability of the software. But through completing the ten individual interviews with industry professionals, the most important part in this convincing and establishing stage is to communicate the value of the product to the lead. As most of the value of the product comes from automating accounting information flow, the received value from investments is abstract and hard to communicate. It is the responsibility of the salesperson to generate a balance between perceived value and the monthly payments through concrete examples.

For example, the ERP SaaS deployment will give employees more time to focus on core business functions by automating past manual processes, providing real-time information about the business in numbers. A difficult situation may arise, when such services are being sold to small companies with small personnel, who might not see their own working hours through monetary value or efficiency. This might generate a disconnect between the price of the SaaS ERP and perceived value. To simply put it, the salesperson must sell efficiency and a new way of utilizing company resources by educating the lead.
As the lead is convinced and a basis for communication has been established, it’s time to form a solution, that is suitable for the lead. This established solution is built based on the lead’s previously stated factors: future goals, desires, current situation and basic metrics. This established solution is next demonstrated to the lead in the ERP SaaS sales process.

4.5 Demonstration
The demonstration step is where the lead for the first time experiences the ERP SaaS solution if they don’t have past experience of it. Basically, this step is about taking the lead to the software environment and giving them a personal introduction to its features. The demonstration-stages duration depends on the size of the sale, the amount of people involved in the investment and how much more convincing the lead requires but in general should be a quick, straightforward step. An important KPI for ERP SaaS selling companies is the number of demonstrations, as this is the step that convinces or dissatisfies the lead. When we compare the number of total demonstrations to the number of demonstrations moved to deal negotiations, we can see how the demonstration effects the process - naturally not every demonstration turns into a negotiation and a purchase, but the higher the percentage, the better.

In this step, the product is the middle of attention and the script of the demo runs either around a basic introduction or a modified introduction depending on what the lead wants to especially know before deciding to buy. It is a great chance to exhibit how the information is secured, how modifiable the software is, how usage is risk free and if the abstract value could not be communicated through the previous step, now the salesperson has another great chance for that. If the lead is satisfied with the demonstration and they are convinced about the suitability of the solution for their own goals and desires, the process moves forward to deal negotiations.

4.6 Deal Negotiations
This sixth sales process step means exactly what it says, it is all about building a deal through two-way negotiations. This step is naturally required to provide a reliable base regarding price
of the product, value for money, product delivery method, training, the terms of payment, after-sale services and maintenance, product quality and other requirements. In the possible case that problems arise that require legal actions, they will be handled through the mutually negotiated terms of the deal.

This step varies greatly in the required time for reaching the final deal, and a correlation between time and company size exists according to the interviewees. For smaller companies, this step can be quite a quick one, but bigger corporations require longer negotiations and the deal might be bounced between the companies for a while until consensus is achieved. As mentioned earlier in the text, Davies (2010) proposes that the legal department should not be included in the negotiation process too soon, as this will very possibly stall the process and jeopardize the close. Only after all the specifics have been decided, should the last formalities and legal investigations be completed by the legal department. (Davies, 2010) When the negotiations have generated a mutually accepted deal with its formalities, it is time to close the sale.

4.7 Closing the Deal
At this point the whole nature of the sale is understood by both parties and the lead is ready to become a buyer of the ERP SaaS. An interviewee from the selling department stated that closing the deal is easy regarding this type of software sales. This is because the lead has been convinced, the product has been established so that the solution feels personal, the lead has seen how it works in action and what it provides and the deal has been negotiated between both parties.

A very significant KPI for sales at this step is the hit rate of sales. This basically depicts the percentage of winning deals and is calculated by dividing the won deals with lost plus won deals. This KPI is great for calculating individual salesperson performance and the probability of sale of different types of leads and customers. Through hit rate a company can generate
forecasts regarding future deal wins and train or change its personnel. After the deal has been closed, it is time to deploy the ERP SaaS and train the buyer.

4.8 Deployment & Training
One well known feature regarding Software-as-a-Service solutions is fast and simple deployment. The buyer soon after closing the deal receives their own account and credentials that allow them to log into the system and start utilizing its features. If the previous demonstrations have not provided enough expertise of the system, there are different ways for the buyer to gain more knowledge through purchasing mixed group trainings or company specific training sessions. More and more of the training is also moving towards the establishment and utilization of e-academies, where users can via internet complete various courses before, during and after the deployment of the ERP SaaS on their own to learn it thoroughly.

No matter how the user is trained - group or company training sessions or through an e-academy - it should be carried out with quality. This is because a well-trained buyer is capable of utilizing the software effortlessly, placing a smaller burden on the customer service, while having greater potential of becoming a promoter of your products. The deployment and training of the ERP SaaS might not always go smoothly and process support is a quite commonly required step in the process.

4.9 Process Support
Process support is the second last function in the ERP SaaS sales process and is supposed to be carried out either by the salesperson responsible for escorting the lead through the previous steps or customer service, depending on the needs and problems. Process support exists in order to help especially with problems related to the deployment of the software. These might emerge from misunderstandings, lack of know-how or simple technical problems in the software. This step of supporting the deployment greatly affects the level of customer satisfaction and the probability of them becoming a promoter. The customer's issues need to
be recognized and solved as soon as they emerge to deliver a delighting experience and turn the setback into a positive occurrence. A internet forum should be provided where users can post possible problems or seek knowledge from other users. This lightens the burden of customer service and these problems and their solutions pile up into an information bank in the long run.

**4.10 CRM**

After successfully taking the lead through the whole process, it is time to maintain and develop the relationship with a goal in mind. A system of relationship management should exist or be created beforehand to make responsibilities and goals specific and measurable. A characteristic regarding ERP SaaS sales according to the interviewees is long relationships, that develop from the interdependence of the companies. Customer relationship management in ERP SaaS sales process has three goals: generating and maintaining references, generating and maintaining credibility of the company and creating upsales.

Through delighting sales process experiences the amount of companies and individuals promoting your company’s software is likely to gain positive word of mouth. This can easily be measured through inquiring how the new leads got information about the offering and a circle of external lead generation that feeds itself can be established. This great situation can only be generated through outstanding customer service and outstanding products.

The customer service team needs to have complete knowledge of the ERP SaaS product, common and previously emerged issues and how these have been solved before. Although a customer service person is not a salesperson per say, they should have a keen eye on realizing potential upsales targets. If a customer exhibits hints about a need for something that the company could help with or the customer service person feels like the software company could provide more value to them, the person should inform the customer, sell to the customer or inform the sales team about this potential upsale. A future trend that is going to disrupt ERP SaaS sales and upsales is going to be the emergence of In-app & online purchasing, this
because of the trend that the customer should have more power in the sales (buying) process. The software should be easily accessible, quickly deployable and functional across all devices - the customer might never need to contact a salesperson in the future, emphasizing the importance of generating promoters and credibility.

The last step of managing customer relationships provides vital key performance indicators. One of these is committed monthly recurring revenue (CMRR) versus time. CMRR is the monthly payment for using the software and the price is linked to net revenue, number of users and what services the customer is using. If we compare CMRR to time, we can see if the customer companies are growing and how fast they are growing. Average revenue per customer (ARPC) can be used as the customer quality indicator, because the more they spend, the more crucial they are for the business. Transaction net promoter score (TNPS) indicates the customers opinion about the company and the salesperson that they were in contact with, measured through personal inquiries. Last KPI for CRM is the churn rate, which measures how many customers end their usage of the ERP SaaS during the first year of deployment, naturally the lower the better.
5. CONCLUSIONS
The bachelor’s thesis’s main research problem was about how an organization sells ERP SaaS and the flowchart on the right is the answer. A research goal was to establish the steps involved in the modern sales process and through ten qualitative individual interviews with industry professionals the steps rounded up to a total of ten. Throughout opening these steps one by one some unique characteristics of ERP SaaS sales process emerged and KPI metrics were discovered for many of the steps to monitor the process. In this final chapter, we conclude this thesis and its findings dividing them into theoretical and managerial applications.

5.1 Theoretical applications
A clear process for selling enterprise resource planning delivered through a software-as-a-service delivery model was generated through this thesis. Unique characteristics and key performance indicators were exhibited in the findings section for each of the proposed steps. A clear distinction can be seen as the ERP SaaS sales process is compared to Kotler & Keller’s traditional and generic six steps to a sales process. The number of required steps in this unique process is considerable and the order of completion also varies between the two. Future research ideas are provided in the final chapter of this thesis.

5.2 Managerial applications
Currently the most crucial step in this unique sales process seems to be convincing and establishment. Companies need to especially pay attention to the execution of processes
involved in this fourth step of the sales process. Enterprise resource planning software-as-a-service sales process in general is cheaper and more efficient for the selling company when compared to traditional, industrial selling. The sales process is quick and in the future it should shorten to 14 days or under. This because in the near future this sales process will become more straightforward through in app & online purchasing, making the role of the salesperson smaller. This disruption will place great emphasis on generating great references and good credibility through outstanding products, service and experiences.

The implementation after closing the deal is tremendously fast and the ways of training the customers should be numerous. Companies selling ERP SaaS need quick and shared information flows, analyses and reports throughout the company handled by the most modern of technologies. The sales process should be used as a basis for driving product development, as lack in current functions may emerge as the product is constantly being demonstrated to new end users. The biggest of problems right now in this industry is differentiation and standing out from the competitors, as the products have very similar functions with similar pricing models. ERP SaaS sales process is challenging for salespeople, as big and abstract values can be hard to sell to people and companies. Companies must make sure that sales and product development departments communicate with each other, as the salespeople need a great level of product understanding, while being capable of offering product development ideas that emerge from the customers. The process is very straightforward and logical, yet unique and dynamic.

5.3 Restrictions
The findings from this thesis carry restrictions with them and should be considered. The generated sales process is only applicable for selling ERP SaaS solutions. The ten-step process of selling ERP SaaS was compiled from ten qualitative individual interviews. The interviewees were from one and same Finnish software company and the interviews were held in their premises with a goal of generating applicable, case-specific information. The individuals were from three different departments, all included within the company’s sales process: marketing, sales and customer service. This is the process that is currently in use and it will
change in the future to fit the products and the markets. The findings could be utilized for the use of other companies and industries, with these restrictions kept in mind.

5.4 Future research
For future research, I propose a couple topics that emerged while completing this bachelor’s thesis. Throughout the interviews, I got to talk with people with different backgrounds, skills, strengths and weaknesses and a question emerged:

What makes a good ERP Software-as-a-Service salesperson?

This topic could be studied both through qualitative and quantitative means and would generate a good frame for what it takes to be good at selling this unique software solution. This question could be approached as skills and traits required or recommended.

Besides the previous future research topic, deeper research should be completed on each of the established steps and functions. A study should be built specifically focusing on only marketing, sales or customer service perspective or any of the sales process steps individually. But more important now than ever is to find out how the buyer experiences this sales process, so research could be done about what makes a great ERP SaaS buying process for a lead company and what are the common steps for the buyers. As stated in the literature review of this thesis, the processes are seen very differently depending on which side you are in.
REFERENCES


 ATTACHMENTS
Attachment 1. Questionnaire before the Interview

**Questionnaire before the Interview**

These questions are filled before the interview.
The answers are anonymous and are only for gathering numeric data.
The goal of these questions is to inspect the quality and reliability of the interviewees.

*Required*

1. Gender *
   *Mark only one oval.*
   - Male
   - Female

2. Age *

3. Last completed level of education *
   *Mark only one oval.*
   - Primary school
   - High school
   - Vocational school
   - University of Applied sciences
   - University

4. How many years have you been in full-time work? *
   *Mark only one oval.*
   - Under one year
   - 1-3 years
   - 4-7 years
   - 8-11 years
   - Over 12 years

5. How many years have you been working in this Finnish software company? *
   *Mark only one oval.*
   - Under one year
   - 1-3 years
   - 4-7 years
   - 8-11 years
   - Over 12 years
6. In which department do you work in? *
   Mark only one oval.
   - Direct sales
   - Accounting Office Sales
   - IT
   - HR
   - Customer service
   - Finance
   - Product development
   - Marketing
   - Invoicing
   - Integration

7. In your work are you dealing with direct sales? *
   Mark only one oval.
   - Yes
   - No
   - I don't know

8. Do you think that your work affects the direct sales process of the company? *
   Mark only one oval.
   - Yes
   - No
   - I don't know

9. How familiar are you with the SaaS software the company is selling? *
   Mark only one oval.

   1  2  3  4  5  
   Not familiar  ○  ○  ○  ○  ○  Very familiar
10. Which of the next departments take part in the direct sales process in your opinion?  
(Sales process defined in the description) *

In simple terms, a sales process is a systematic approach involving a series of steps that enables a sales force to close more deals, increase margins and make more sales through referrals. For example: Prospecting > Approach > Negotiation > Close > Follow-up & Maintenance

Tick all that apply.

☐ Customer service  
☐ IT  
☐ Direct sales  
☐ Product development  
☐ HR  
☐ Marketing  
☐ Finance  
☐ Accounting Office sales  
☐ Invoicing  
☐ Integration

11. Do you have sales experience? *

Mark only one oval.

☐ No  
☐ Under one year  
☐ 1-3 years  
☐ 4-7 years  
☐ 8-11 years  
☐ Over 12 years

12. Free comments regarding the pre-interview questionnaire:

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________
Attachment 2. Interview

**Bachelor's Thesis Interview**

A interviewing form, which aims to gather information about Software-as-a-Service sales process, its steps and characteristics within this specific company.

*Required

1. The interviewee: *

2. Job title of the interviewee *

3. How long have you been employed in your current department? *
   - Mark only one oval.
   - Under a year
   - 1-4 years
   - 5-8 years
   - 9-12 years
   - Over 13 years

4. How significant is your effort for generating new sales or upsales? *
   - Mark only one oval.
   - Very significant
   - Significant
   - Not very significant
   - Not significant

5. Why this level of significance?

   __________________________
   __________________________
   __________________________
   __________________________

6. What steps are involved in selling this SaaS software in your opinion? *

   __________________________
   __________________________
   __________________________
   __________________________
   __________________________
   __________________________
7. Small descriptions of each stage: *


8. How long does a customer stay in each stage in average?


9. What KPIs should be noticed in each stage?


10. What characteristics or differences are involved in selling SaaS? *


11. What are the difficulties of selling SaaS? *


12. Is the direct sales process of the company clear? *
   Mark only one oval.
   ☐ Yes
   ☐ No
13. Why yes or no?


14. How could the process be made clearer?


