Sales Force Automation: CRM, Dashboards and Empowering Mobile Technology Used by Millennial Salespeople

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This is a working paper in preparation for final submission for the Atlantic Marketing Association - September 2018

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Abstract

Sales Force Automation (SFA) has been in use in the sales world for the past twenty years. SFA tools are computerized systems that provide sales team members and managers with the functionality to Track sales leads, manage contacts, control customer relations, monitor sales processes, schedule meetings, forecast sales, and analyze employee performance. Although the goal of SFA tools is to increase the efficiency and effectiveness of sales teams, commercially available tools, such as Salesforce.com, Marketo, and even the Apple Square, often fail to accommodate the specific needs of a company. Recent interest and developments in business process management (BPM) software, an emerging technology for modeling and automating business processes, enable individual firms to custom design their own SFA tools. The Millennial sales force is often equipped with the knowledge and skills to quickly adapt to SFA, dashboards, social media and mobile technology to leverage their sales efforts.

This paper discusses the usefulness of SFA tools and software, including identification of a detailed sales process, analysis of reporting capabilities through traditional and mobile dashboards, and a potential model for determining outcomes of the sales process, and a decision-analytic model for optimizing sales force resource allocation. The methodology applied to this study consists of personal interviews. Qualitative data are gathered and scored appropriately to determine the usage of SFA among Millennials.

Introduction

This study defines a framework for understanding the effect of sales force automation (SFA) on customer relationship management (CRM) processes from the perspective of the Millennial demographic. The marketing literature defines Millennials as the Gen Y cohort, born between 1981 and 1996. Most Millennials show attitudes and values, including work-related skills, that are unique from those of their predecessors. The CRM process is defined as “the development and leveraging of market intelligence for the purpose of building and maintaining a profit-maximizing portfolio of customer relationships.” Today’s technological advances deliver more context-sensitive business support than has previously been available. Cloud-based platforms require less upfront investment and simplify system administration and operations (Zablah, A.R., Bellenger, D. and Johnston, W.J. 2004). To maximize results, this phenomenological study will gather and extract data from personal interviews with Millennial salespeople in an attempt to show that different SFA functionalities generate either intuitive or counterintuitive effects on sales activities. Implementing SFA and CRM processes among millennial salespeople will have positive results for major sales forces for both small, medium and large-scale companies. The study will review all new and unique tools used to conduct business today. This includes many Apple and Microsoft CRM platforms, social media, dashboards and various other types of' software.

Literature Review

With the exception of the Schultz and Schwepker (2012), an article titled; Boomers vs. Millennials: Critical Conflict Regarding Sales Culture, Salesforce Recognition, and Supervisor Expectations, the current literature does not substantially address the effects of the use of SFA by Millennials or other demographic cohorts. Speier, C., & Venkatesh, V. (2002) attempted to examine salesperson perceptions of customer relationship management (CRM) technology. That longitudinal study surveyed 454 sales employees of a telecommunications and a real estate firm that had implemented sales force automation tools, but it did not specifically address Millennials or any other demographic cohort.

Today’s workforce includes the largest ever diversity of generations (Glass, 2007) with over 60 years separating the oldest and youngest workers (Crumpacker and Crumpacker, 2007). This generational gap has led to several unresolved questions. Are the current sales management methods desired by Baby Boomers equivalent to those of younger generations currently being recruited?

Honeycutt (2005) offers a distinct, personnel-based view of the need for, application of, and advantages of SFA. Technological advances have enabled both practicing managers and salespeople to perform their jobs more efficiently through the use of sales force automation; however, the effects of SFA use according to the age of salesforce cohorts have not been reported. Ingram et al. (2002) note that CRM extends SFA from a focus on the salesperson and on improving the efficiency of task management to a focus on the customer and improving the effectiveness of customer relationship processes. Smayling (2016) notes that due to their adeptness and familiarity with mobile technology, the millennial generation may increase organizational efficiency and productivity through the use of mobile CRM. The researchers used snowballing to identify informants for accrual (Streeton, Cooke, & Campbell, 2004).

Multiple case study was employed to establish patterns in the receptivity and usage of CRM systems. This study seeks to contribute generalization of theory across industry populations (Jørgensen & Sjøberg, 2004). One of the key advantages of the qualitative research method is that it allows the researcher to investigate contextual themes to engage in a phenomenon (Bazeley & Jackson, 2013; Myers, 2013).

Yin (2014) recommends the use of the case study protocol and the integration of a case study database to embrace the reliability of the study. To enhance construct validity he recommends using multiple sources of evidence and recommends incorporating replication logic into multiple case studies to enhance external validity. The researcher sought a homogenous sample was sought to understand how millennials salespeople use CRM systems with relationship management. Van de Ven (2007) notes "(a) homogenous sample….facilitates the development and investigation of very precise, focused questions or hypothesis (p. 211).

The researchers use an engaged scholarship approach to this study. "Engaged scholarship is defined as a participative form of research for obtaining the different perspectives of key stakeholders (researchers, users, clients, sponsors, and practitioners) in studying complex problems" (Van de Ven, 2007, p. 9). By involving others and leveraging their different kinds of knowledge, engaged scholarship can produce knowledge that is more penetrating and insightful than when scholars and practitioners work on the problems alone (Van de Ven, 2007).

Buehrer, R. E., Senecal, S., & Ellen, B. P. (2005) performed a qualitative study to gain insights about salesperson use of automation technology, including insights into why salespeople either use or do not use this technology. The initial study surveyed 130 salespeople from various industries. The current literature affirms that a sales force must believe that the appropriate resources and support have been put in place before they will rally behind a technological initiative. This can include informing salespeople about the system's features and benefits prior to the adoption of the technology and providing help to salespeople in implementing the system (Jones et al., 2002). Accordingly, a key predictor of use is onboarding and sufficient training. To support and encourage SFA adoption both sales supervisors and top managers should show commitment to the technology (Cascio et al. 2010). Research shows that reps are more likely to use a system when they feel initial training sessions are relevant and meaningful (Jelinek, Ahearne, Mathieu, & Schillewaert, 2006).

Fisher, C. (2017), in an article entitled New Technologies for Mobile Salesforce Management and CRM, states that major organizations are choosing to retire their fleet of laptops in favor of transitioning to the more nimble approach of mobile technology. Fisher (2017) also addresses the need for organizations to embrace digital technology as the preferred business platform.

Successful Implementations of SFA

Company success stories will be included in this section.

Hypotheses

This study will advance five hypotheses:

H1: Salesforce automation enhances the sales process among all salespeople age cohorts.

H2: Millennials believe that off-the-shelf CRM and SFA are less effective than customized mobile technology platforms for sales organizations.

H3: Millennials are quicker to embrace and take ownership of SFA compared to older-generation salespeople.

H4: Millennials agree that resource allocation for SFA is more popular among medium-sized sales-centric organizations than larger companies.

H5: Millennials believe that successful deployment of sales force automation and CRM improves scale efficiencies and help generate more revenue for their organizations.

Methodology

The use of a robust phenomenological case study is an appropriate qualitative approach for this research. The researchers will use combined methods, including conducting interviews, reading documents, watching videos, and visiting sales organizations, to understand the meaning and importance of SFA, CRM, and mobile technology among a cross-section of Millennial salespeople. Participants' perspectives will be regarded as a reliable source of insight into their motivations. To build a sufficient dataset, a review of 4 to 6 interviews will be conducted to identify emerging themes (Fusch & Ness, 2015). Participants may be interviewed more than once to confirm the research findings (Griffee, 2005). Interviews were used to develop themes.

To triangulate the results, the researchers will use several means of data collection, such as structured interviews, company records and CRM enterprise adoption (Patton, 2005).

In fact, Yin (2014) suggests that "data triangulation helps to strengthen the construct validity" (p. 121). This will allow the researchers to achieve data convergence (Robert K. Yin, 2014).

The researchers used a case study database that was separate from the study that will house the data. This database will extend the narrative and quantitative information to include all materials and documents that were conducted in the field (Robert K. Yin, 2014). This exploratory case study will use a grounded theory approach.

A case study is relevant when the research question is how or why in nature. A case study is also used when focusing on contemporary events where little is known about the phenomenon.

The researchers used semi-structured interviews which lasted for 45 minutes to 1 hour. Weitz and Bradford (1999) discussed “the shift from a focus on seller’s short-term profits and sales to the relationship between the buyer and seller” (p. 244). Miles & Huberman (1984) suggests the importance of coding in qualitative research.

“Case studies typically combine data collection methods such as archives, interviews, questionnaires and observations” (Eisenhardt, 1989, p. 534). Case studies can be used to describe (Noor, 2008).

Case studies can be used to generate theory ((Gersick, 1988; Harris & Sutton, 1986). Eisenhardt (1989) states that it is not possible to fully achieve a theoretic clean slate.

The researchers' approach to this study was to have no priori. "Theory building research is begun as close as possible to the idea of no theory under consideration and no hypothesis to test" (Eisenhardt, 1989, p. 536). Robert K Yin (1994) identified three conditions that make the case study the ideal method of inquiry for researchers which include: a) how or why research questions, b) when researchers have little or no control over behavioral events and c) when the focus is on contemporary events versus historical events. This is a contemporary issue that has not been fully examined, therefore it is an excellent choice for the case study.

“Enhance the performance of salespeople is perhaps the most important task facing managers in the current business environment” ((Boles, Brashear, Bellenger, & Barksdale Jr, 2000, p. 141). “One relatively unexplored type of salesperson behavior involves activities that lead to customer relationships” (Boles et al., 2000, p. 143). Research suggests that a linkage exists between the behavior of the salesperson and their sales performance (Brown & Peterson, 1994).

Results: The data are currently being gathered and will be released prior to the final presentation date.

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Keywords: SFA, Millennials, Digital Natives, Marketo, Cloud Computing, CRM, Mobile technology, Social media, Apple Square.

Track: Professional Sales and Sales Management

ID#: 1320