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MÜÜGITÖÖ PARANDAMINE LÄBI UUE MÜÜGIJÕU AUTOMATISEERIMISE

Bakalaureusetöö

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Annotatsioon

MÜÜGITÖÖ PARANDAMINE LÄBI UUE

MÜÜGIJÕU AUTOMATISEERIMISE

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Töö tulemusena on tehtud analüüs turul olevale müüginimeste meetodist ning on pakutud välja uued. Uue meetodi kohta on püstitatud nõuded ning müügi protsessi kohta on kirjeldatud ärilise poole nägemised.

Lõputöö on kirjutatud inglise keeles ning sisaldab teksti 38 leheküljel, 6 peatükki, 21 joonist.

Abstract

Sales Work Improvement Through the Implementation of the New Sales Force Automation

The present bachelor thesis treats the sales process improvement. The purpose of these activities is to offer better work organization and thereby change sales work to become more effective through the deployment of the new Sales Force Automation. The need to improve this process was because the existing sales process can be more effective to close more deals.

In the first part of the work, it is described the structure of sales work, software solutions, and work tools which are effective right now. In the second part, going to the main weaknesses in the sales process and going to offer improvement in one of the parts of the sales cycle, which will help to describe the main requirements for the sales force.

As a result of this work, the author wants to present solutions in the market, which meets the requirements of the companies to increase sales. The thesis is written in English and contains 38 pages of text, 6 chapters, 21 figures.

List of abbreviations and terms

CRM	<i>Customer relationship management</i> Süsteem, mis on mõeldud kliendisuhete juhtimiseks.
SFA	Sales Force Automation Müügivõimude automatiseerimine süsteem, mis automaatselt registreerib kõik ettevõtte müügi etapid. See hõlmab klientide kontaktide jälgimise süsteemi ja potentsiaalsete klientide tuvastamise süsteemi. [1]
RPA	Robotic Process Automation
AI	Artificial Intelligence
Robots	Entities which mimic human actions
Process	Sequence of steps which lead to a meaningful activity
Automation	Any process done by a robot without human intervention
SQLs	Sales Qualified Lead A prospective customer that has been researched and vetted — first by an organization’s marketing department and then by its sales team – and is deemed ready for the next stage in the sales process. [16]
Sales Cycle	A sales cycle is a process that your company undertakes when selling a product or service to a customer. Think of this as a series of steps that leads you up to a sale. [15]

SMTP

It Stands for Simple mail transfer protocol. It is simply used to transmit messages from source to destination. The ability to queue up messages at receiving end via this methodology is very limited.
[17]

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1 Introduction

Nowadays to hit revenue and growth goals, companies must continuously increase sales volume. Whether we like it or not, business is being transformed by technology. While we don't know what the future will bring, we have a good idea of how to prepare, so that we adapt to benefit from the opportunities presented. This is why we are seeing so many changes. Over 1 million knowledge-work jobs will be replaced in 2020 by softwares, RPA, virtual agents and machine-learning-based management.

The worldwide market for Robotic Process Automation (RPA) services will grow to \$12 billion in 2023. It means that workers may see the content and quality of their jobs shift as technologies are adopted for particular tasks. While many "commodity tasks" have been automated or going on in the next few years, what is going to happen with one of the oldest and traditional jobs as a salesman. [1]

In any organization, the sales department plays a big role in the success of the business. The role of sales is to find a way between the potential customer's want and the products that the organization offers that can fulfill their needs.

Sales play a key role in the building of loyalty and trust between customers and businesses. Trust and loyalty are the main reasons why a customer would buy a product. Positive feedback from interacting with a salesman can have a huge impact on the growth of the business.

Selling is an interaction between one human and another. The personal connection between two people can affect a brand's reputation. It is crucial to have a good one and with new Robotic Process Automations companies can have a big transformation, which can impact the long-lasting impact on the customer.

Typically, sales companies find it easy to see the benefits of Customer Relationship Management (CRM) systems. CRM is an easy-to-follow format, which allows salespeople to monitor sales processes, staff performance, and, as a result, optimize selling. But CRMs don't impact the interaction between people. This is where Robotic Process Automation can make a difference. [2]

The present bachelor thesis focused on sales process improvement. This work might benefit every sales organization that interacts with potential customers verbally. Salespeople can improve their sales performance by new ways of selling by using automation of knowledge work processes.

1.1 Background and motivation to study

The present bachelor thesis is focusing on optimizing the process of selling to different types of people. In this thesis the author is going to indicate types of selling to main personality types of people by implementing robotic optimizations, which can impact the results of sales processes.

In this thesis, the author is going to study different techniques of selling, cycle of sales and psychology behind to bring out the most important communication skills as a person who works in sales must have to succeed in different types of sales such as telemarketing, Business2Business, Door2Door, and sales throw video calls which become more common since the COVID19 hit our planet in 2020. [13]

The author has experience in sales and recruiting salespeople over video calls and face to face communication for over 5 years. The author made many interviews with representatives in sales companies. Interviews were made with TOP salespeople from Southwestern Advantage, G4S project Nublu AS, and SOS Children's Village International.

Practice shows that even the most experienced communicators make mistakes. By improving communication skills, a salesperson will make more sales.

Salespeople are reading different books about sales, working with CRMs by optimizing their time-consuming processes. But the most common question in the sales force is how to learn about reading people and understanding the way they want to buy.

Sales representatives answered that the best way to improve sales is to get experience by talking with as many clients as they can. This is where the main problem is hidden from the eyes. Salespeople look at selling in a lot of ways, but few get what sales are all about. They don't understand the game of sales and it's costing them deals and greater success. The game of sales is a data game. It's about getting as much information as possible about the buyer's current state and what's going on.

The future of sales is technology. Startups and many other sales companies are already applying big data, deep machine learning and artificial intelligence to every part of the sales cycle. There are currently nearly 150 companies building products to help sales professionals, sales teams and companies automate their sales efforts. And it's not just sales CRM's, startups are using artificial intelligence to improve actual sales calls. [3]

For many salespeople it is time to change the way to sell. The days of writing selling emails manually and learning sales talk by hard is over. The game is going to change with technology.

The idea behind this thesis is to bring out different ways to optimize sales performance and create more trust from interacting with people by using Automations of knowledge workers.

In this thesis, the main task is to change sales work to become more effective, which is going to raise trust with potential customers and finding a way of how people want to buy from sales representatives. To find the right result the author should analyze the processes which are active nowadays. As a result, the author should present an optimization idea, which is going to reduce losing the clients and is going to be available to implement now.

1.2 Setting the task

The aim of this thesis:

- To study different techniques of selling and cycle of sale and psychology behind it.
- Identify weaknesses in the existing sales process and develop requirements to improve the sales process and increase efficiency.
- Bring out different ways to optimize sales performance and create more trust from interacting with people by using Robotic Process Automations.
- Using salesforce with automated processes to see the value on increase efficiency.
- Finding suitable sales force automation solutions according to the results of the analysis.

In this thesis, the main task is to change sales work to become more effective by using new technologies and automation. Firstly to study different techniques of selling and cycle of sale and psychology behind it. Secondly, identify weaknesses in the existing sales process and develop requirements to improve the sales process and increase efficiency. Thirdly to bring out different ways to optimize sales performance and create more trust from interacting with people. Fourthly, it is important to see the value of automated processes, and then the author is going to bring a suitable solution according to the results of the analysis.

1.3 Methodology

In this bachelor's thesis, the author uses the reorganization of the existing sales cycle to increase the efficiency of the sales process.

During the time of writing this thesis was made an interview to understand better all problems that sales representatives face in everyday practice with many sales representative from Southwestern Advantage company.

In the beginning, Author writes about the sales cycle, and different personality types of buyers, their motivation for buying goods. How salespeople are working and what kind of problems they usually face when they don't get sales. Based on the collected data, the author goes to the basics of functional and non-functional requirements for sales force automation and how RPA or AI might be helpful.

As a result, the Author will offer a verbal/non-verbal sales force automation system, which is going to focus on collecting data and helping salespeople increase their closing percentage of sales or time consuming from different parts of sales cycle.

1.4 Overview

This bachelor's thesis consists of 6 parts. The first part gives an overview of the given bachelor's thesis.

The second part gives the general information about the sales cycle, different types of people, and psychology behind it.

The third part is about data importance and software solutions and tools for sales work.

The fourth part, the author analyzes on finding suitable sales force automation software or the concept solutions according to the results of the analysis.

The fifth brings out different ways to automate sales performance and automated process of interacting with people by using RPA.

In the sixth part, looking at the results of the automated process to see the value of increasing efficiency of salespeople at work and writing a summary of the work.

2 Sales Cycle and psychology behind it

2.1 Sales Cycle

The sales cycle is the process that companies follow when selling a product to a customer. It combines all activities associated with the closing sale. Many companies have different steps in their sales cycle, depending on how they define it. The sales Cycle defined as the time it takes to bring a qualified prospect to close.

Keeping track of the sales cycle is important and gives a business insight into the efficiency of their salespeople. The length of this process can be tracked and analyzed. Sales Cycle depends on the industry and the way of selling. There are many ways of selling: Door2Door, Business2Business, Face2Face, and so on. Having a fast sales cycle is better for businesses, because the longer it takes to make a sale, the higher the chance, that sale would disappear.

The execution of the following sales cycle stages usually depends on product, service, company, or even industry. However, the order of the stages is typically the same, no matter the situation. [4]

2.2 Sales Cycle Structure

Understanding a sales cycle, coming from the stages it's composed of. Here's a breakdown of each one. [5]

Prospect

In this stage, you'll identify sales qualified leads (SQLs) with prospects who are a good fit for your product or service and who might be interested in hearing what you have to say. True professionals don't plunge into a sale blindfolded. They do their homework on a client before they engage in business discussion.

Connect

Engage with your prospect on the way your sales cycle is designed. Reach out over email, phone, or face to face contact.

Introduce yourself, share the value of what you have to offer, and ask if they'd be interested more.

Research

When your prospect is interested in learning more, it's time to discover more about their needs. You'll learn more about their business and your ability to meet those needs.

Present

Now, it's time for the presentation. This is usually built around a pitch template, which salespeople use and customizes for each prospect's unique needs by the information from the research part.

Handle objections

After the presentation, people are interested in prices, thinking about their budgets and competitors. A salesman should know the product and be prepared to listen intently to close the deal.

Close

Asking whether the prospect is ready to buy. Helping a prospect make a decision that will serve his or her long-term best interest.

If a prospect says, "Yes," draw up the contract. If they say, "No," work with objections or it is the end of the deal.

Follow up

The sales cycle doesn't end with closing a deal. After closing the deal, the next step is to work to get more trust from customers, keep them on board, and leverage them to generate new business.

2.3 21st Century Seller

Back to the 2000s. It was that prospects needed to meet with a salesperson to learn about the products and services that the company was offering.

Today, that market is downright quaint. Product information, answers to most questions, via user reviews, and website information is all found online. Nowadays prospects learn almost everything they need to know faster, and with more accuracy on the web than they do from salespeople.

As a result, it's pretty rare these days that a salesperson can get an audience with a prospect. But all the new technology and changed behavior of buying from online channels will never change the human dimensions of selling. From book High trust selling by Todd Duncan [6], the author found that people love to talk about their needs, especially with people who are willing to understand those needs. People appreciate the help, especially from people who are knowledgeable and experienced. The best poker players in the world are known for their ability to read people and the best salespeople in the world have the same talent. While poker players read their opponents with the goal of defeating them, however, salespeople read prospects with the goal of helping them. Being a salesperson is really about giving, not getting, and that selling is not something you do to people, but something you do for them. Aim of selling is to provide value to clients by asking them questions and really listening to the answers.

With this information, the author can make a map of the salesperson in 21 century.

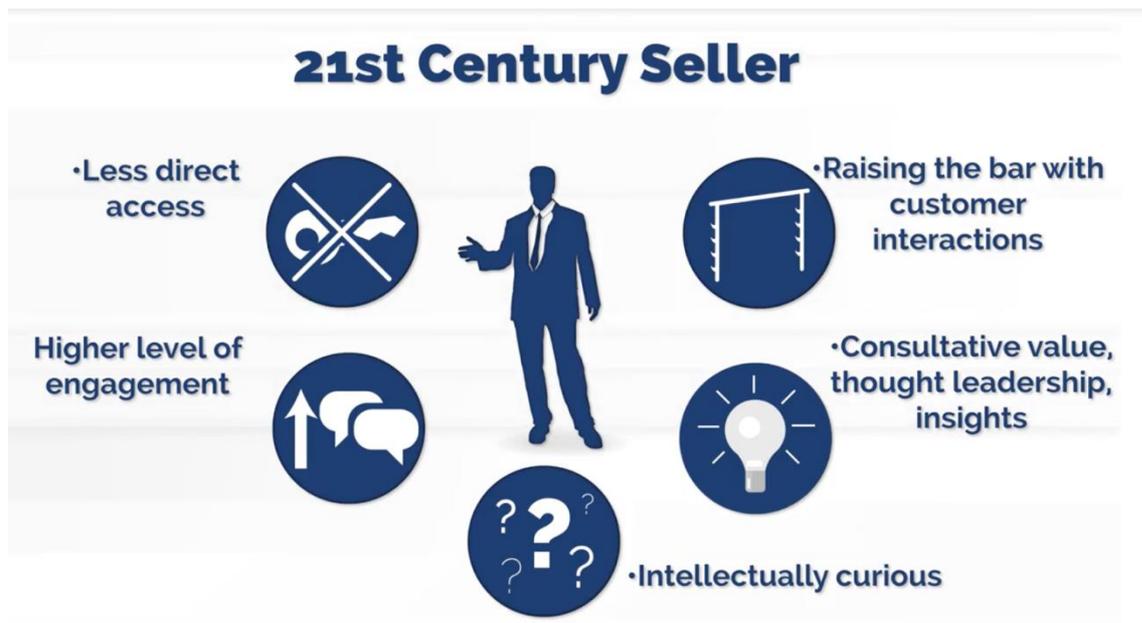


Figure 1. salesperson in 21 century

2.4 Different types of people

The Navigate system has found that people tend to fall into one of four dominant behavior styles: Fighters(Dominance), Entertainers(Influence), Analytics(Conscientiousness), and Amiable(Steadiness). [7]

Fighters are motivated by results, and it's important to them to be in control. They want to know why you are contacting him and what this is about.

Entertainers are social butterflies and enthusiastic extroverts. They love people and they care more about emotions than facts.

Analytic types are practical analysts. They are always on the hunt for details, and unlike Entertainers, they rank the value of facts over emotions every time.

Amiables are laid-back diplomats, they have the interest of the team at heart. They love security and consistency, and they don't like to decide right away. They are driven by people and emotions.

People are selling and buying differently as well. Every salesperson had a natural style of selling. Very few people identify 100 percent with just one style. People are typically a combination of styles, with one dominant and one secondary style in the mix.

Each of the four selling styles has its strengths and growth opportunities.

With today's technology, the information by which you can recognize buying style has gotten easier. You can get a pretty clear idea of someone's buying behavior style by social networking websites, messages and whole fingertips through online tools. Buyers want to dictate how they want to buy and there are technologies, which gives focus to salespeople to navigate them.

3 Software solutions and tools to automate sales work

The development of technology and the explosion of the computer age has brought new automation products and systems. There are 3 types of automation. [8]

Hard automation (fixed automation): A sequence of operations fixed by the system configuration. This type of automation is referring to the use of specialized equipment. The operations within the sequence, for hard automation, are typically simple, meaning they involve plain linear motion and rotational motion.

Programmable automation (flexible automation): This type of automation is designed with the ability to change operation sequences. Operation sequences get controlled by a program that is based strictly off instructions coded into the system. New programs can be continually entered to produce new products.

Soft automation (flexible automation): This type of automation is considered an extension of programmable automation. It has the ability to produce a variety of sequences.

Investments in marketing and sales automation systems having a big potential for productivity improvements. Marketing and sales costs average 15% to 35% of total corporate costs. [9]

The focus on marketing and sales automation provides a welcome lever for boosting productivity.

There are two main programs to optimize processes of working knowledge. Selenium based programs which automate web applications and RPA automates business processes. Both Selenium and RPA follow a set of tasks to automate a given process. Selenium tests only web applications, this is why it can run only on web browsers. It cannot be run on desktop or mobile applications. RPA is a platform which is independent and it can be run on any platform.

3.1 Sales Force Automation

Sales force automation refers to a system that is designed to improve sales productivity by automating different sales processes. Salesforce automation tools can enable sales teams to spend more time each day speaking to leads and less time dealing with paperwork, leaving voicemails and logging data in CRM tools. The main job of sales people is to acquire new customers. This work involves finding customers, meeting with customers, preparing sales offers, drafting contracts, to make changes and additions to the customer's contract and maintaining customer relationships during the sales cycle.

3.2 Robotic Process Automation

Robotic Process Automation is a form of mimicking human actions based on software robots(bots) that lead to a meaningful activity without any human intervention. To have automation anywhere there are many RPA tools. The most popular RPA tools in the market today are “Uipath”, “Blue Prism”, and “Automation Anywhere”. It can remove time and cost from business processes. It

reduces manual processing time, illuminates copy and paste errors, and improves customer services. RPA records a sequence of actions and playback actions. Usually, it involves logging into applications, navigating to screens, controlling applications with mouse or keyboard, copying, and pasting values. Software bots are used to mimic human activities and perform tasks and RPA is used to automate the backend processes. Apart from imitating human actions, repeating high volume tasks, and performing multiple tasks at once. RPA can also be used to do the following:

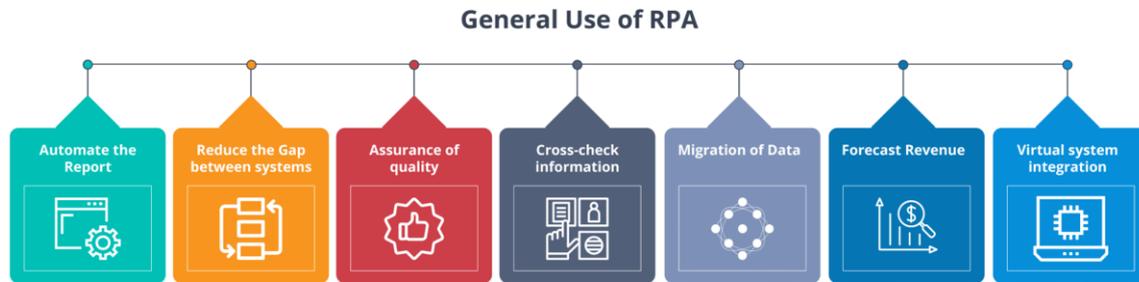


Figure 2. General Use of RPA

Automate the Report Generation – Make reports by automating the process of exporting and importing data.

Reduce the Gap between Systems – Reduces the gap between systems and having faster process.
Assurance of quality – Delivers quality product by performing testing and automating customer support.

Cross-check information – Data across various systems is cross-verified before analyzing.

Migration of Data – RPA allows automated data migration through systems.

Forecast Revenue – Updates financial statements to predict revenue automatically by data.

Virtual system integration – Automated systems transfer data between legacy systems by connecting them with CRM.

RPA is also able to use optical character recognition technology to read information from different sources and automatically enter it into CRM systems without losing accuracy. This is where salespeople can save a lot of time because CRM systems don't sell – it is a tool for organizing. The most valuable asset a salesperson has is time.

Sales professionals spend time entering data into the CRM system, while they can use this time to close the deals. Later on, this data has to be entered into a different system for the finance department. RPA can automate sales order tasks on an end-to-end basis, such as entering sales orders and writing follow-up letters.

The author found that today’s sales professionals spend a significant amount of their time on non-selling activities. The problem is, when they’re tracking down a customer contact, updating a spreadsheet, they’re not selling. The development of technology gives the opportunity to achieve a goal of making every minute count, the Sales CRM platforms and RPA are more and more working together.

3.2.1 UiPath (RPA tool overview)

UiPath is one of the leading market leaders of RPA Tools. An RPA is not just about automation but more about reducing inefficiencies. This tool is used to automate repetitive tasks and offers a drag and drop functionality, it doesn't require any programming knowledge and is easy to use. UiPath Studio is a tool that allows users to design automation processes visually through diagrams. [10]

The UiPath Dashboard has four panels apart from the workplace to design automation.

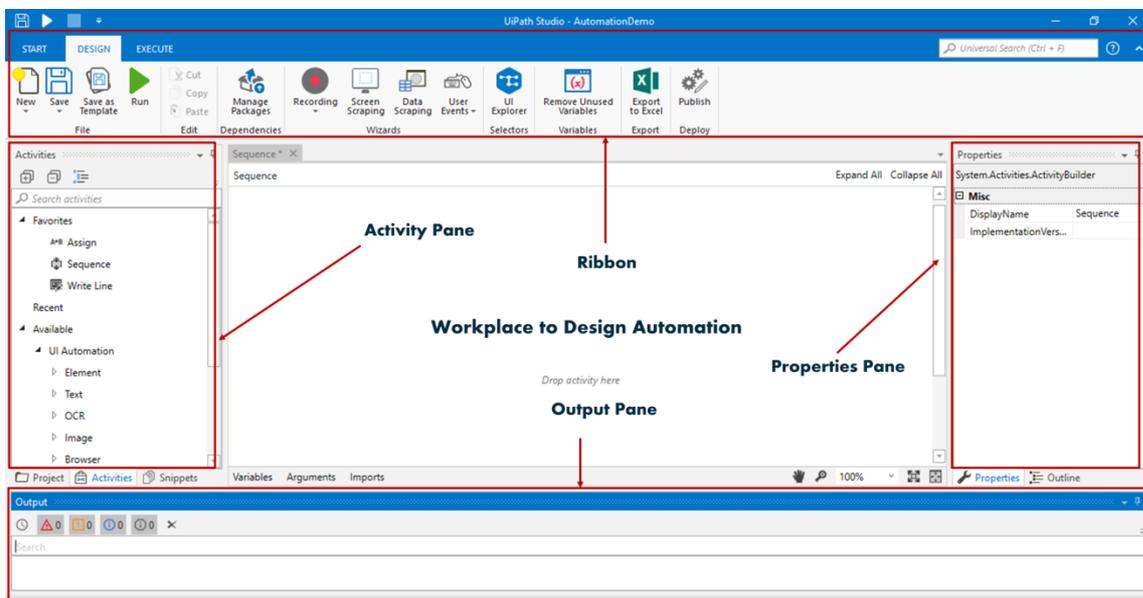


Figure 3. UiPath Dashboard

Activity Pane: This part has all activities which are used for different functionalities such as printing output, for loop, etc.

Ribbon: Ribbon consists of options such as Save, Run, Data Scraping, Recording, etc.

Properties Pane: Properties pane have dragged and dropped activities into the automation.

Output Pane: The output pane displays the console.

3.2.2 Customer Relationship Management (CRM)

CRM is a set of practices, strategies, and technologies used to manage customer interactions and data of the sales processes. CRM operates across the sales lifecycle to improve customer relationships and sales department. CRM holds information on customers across different channels. These channels include the company's website, telephone, email, and all kinds of social media.

Managing CRM requires a pool of skilled employees. Activities in the prospecting stage may include cold calls, email, and any number of other activities designed to gain access to potential clients. In prospecting, the activity level is high and you need to put this data into CRM.

This is the area where the employees would usually have simple, repetitious & rule-based tasks, where a BOT replaces human effort.

As a result, companies are looking for improving productivity with CRMs. In customer processes, it is important to be quick, consistent, and accurate.

3.2.3 CRM and RPA

On this chapter, the author is giving a basic understanding of the compatibility between CRM & RPA.

Users of CRM perform tasks that are repetitive and high in volume – with structured input and few exceptions. Such tasks are easily managed by RPA systems. An RPA process can easily handle repetitive and high-volume tasks.

RPA should be introduced into CRM suits to reduce human efforts.

RPA projects have clear benefits by replacing specific human effort by automation. Many people and businesses don't think about time and most of the companies don't calculate how long it takes to complete a simple, repetitive task.

There are already some fully functional RPA systems in use. One of them is the People.ai startup. Using cognitive technology, they can complete any repetitive task a human being does in everyday working life. RPA is offering a huge difference in cost and operations management of the repetitive work of salespeople. RPA and CRM compatibility is taking place in business processes and going to be everywhere very soon.

3.2.4 People.ai (RPA and CRM example)

People.ai is a company bringing machine learning algorithms to sales operations. [11] People.ai software tracks the full scope of communication touchpoints between sales teams and customers. The company's machine learning tech is also meant to generate the average best way to close a deal — educating salespeople and helping them to understand the client better based on data, which is taken from the CRM platform.

People.ai is one of a number of well-funded tech startups that are working in implementing robotic optimizations and AI, which can impact the results of sales processes.

Leveraging People.ai for CRM activity and data entry automatically increases CRM adoption, eliminates repetitive tasks, increases sales team productivity, reduces administrative time, and reduces the opportunity for human mistakes at work.

People.ai analyzes the data and works to create a unique way to get the customer on board by helping salespeople. People.ai is also tracking all activities of salespeople in a company. By doing that and gathering information, they have all the data they need to analyze the activities of high performers by segment, industry, product, deal size, etc. With this information, sales teams can easily find all the gaps in the sales cycle.

4 TO-BE Analysis

In this chapter, the author analyzes the process of writing follow up letters which is represented in the last part of the sales cycle, by using RPA, having different methods: SWOT analysis and quantitative survey. The author found, that RPA solutions suits better for optimizing sales work, because selenium tests use only web applications, this is why it can run only on web browsers. It cannot be run on desktop or mobile applications. RPA is a platform which is independent and it can be run on any platform.

4.1 4.1 SWOT analysis

SWOT analysis is a structured planning method that examines a company's four elements: strengths, weaknesses, opportunities, and threats [12]. The author has developed a SWOT analysis that brought the strengths, weaknesses, opportunities, and threats of the writing follow up letter to a customer.

4.1.1 Strengths

Follow-up letter is much more an expression of thanks and a reminder of your business than a sales letter but it might be a sales letter as well by understanding the type of prospect. Written follow-up is a proof of a desire to have a business in the future. Follow-up gives a personal touch to the business transaction and will help the company to stand out from the identical numerous business emails.[14]

4.1.2 Weaknesses

The biggest weakness can be considered as a time, which salespeople can use to make more sales. A follow-up letter takes effort. There are several components for sending a good sales follow-up email and closing more deals. Most of the time people are writing them without structure and many salespeople just don't know how to write or can forget about writing it at all. Most operations with writing performed manually, which leads to repeated actions and financial costs.

4.1.3 Opportunities

The biggest opportunity can be considered as an RPA process. The RPA process can easily handle repetitive and high-volume tasks such as writing follow-up letters. As a result, business leaders would see improvement in productivity with this automatization.

New sales representatives are going to have standardized letters for different types of people. It can reduce time-wasting for thinking about the structure of writing letters and it has the chance to jump in and win the prospect. RPA is avoiding generating ideas for emails and giving an extra time with the client or finding a new one.

How important is to analyze the person before contacting him/her?

24 ответа

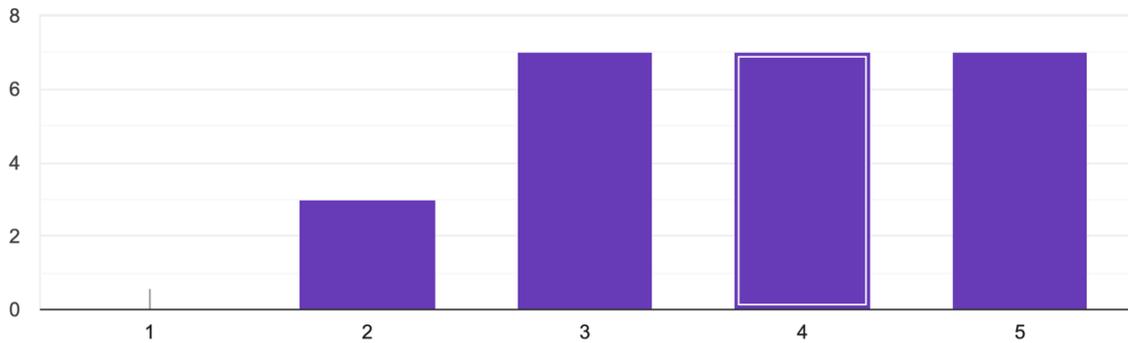


Figure 5. Second question answers

The purpose of this question was to investigate how many people are finding the importance of finding information and gathering it before contacting a prospect. It can be seen from the answers that the majority (58.4%) are finding it important to gather information before contacting the prospect. It can be assumed that people who answered are looking for something that might be helpful to them in finding more information about their sales leads.

Do you find it easy to write a letter to a customer?

25 ответов

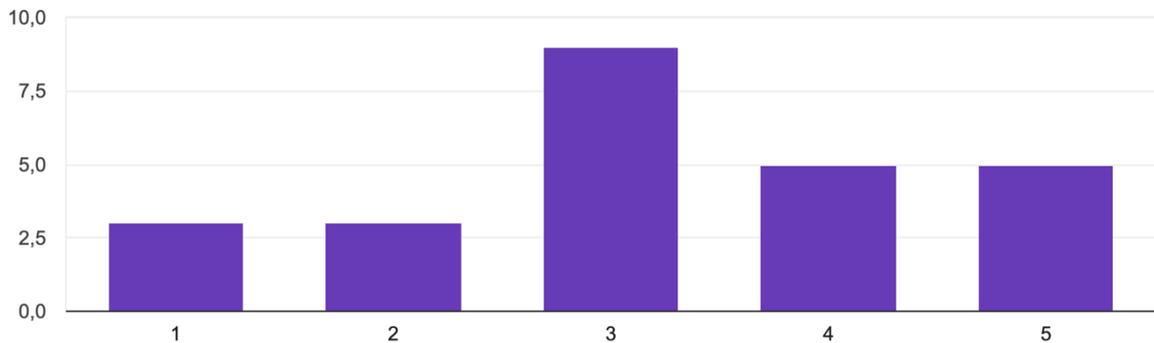


Figure 6. Third question answers

The answers to the question of the difficulty were quite probable for the author. Average from the answers was 3.24, that writing follow-up letters to people is hard from scale 1 to 5. For most people, it still takes time and effort. Chances are, that people will try to save their time by using an RPA. Based on the answers, it can be assumed that people would like the automated process of a writing follow-up letter.

How many sales you had in 2019?

25 ответов

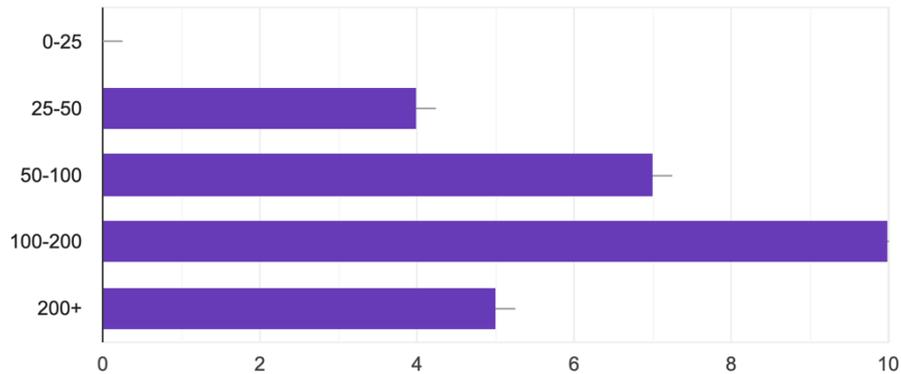


Figure 7. Fourth question answers

The purpose of this question was to investigate how many clients were in a period of the 2019 year. More than 15 people from 25 answered that they had more than 100 clients. This result may mean that people were spending quite a lot of time on writing their clients manually. From answers, we can assume that most of the sales managers in “Southwestern Advantage” were having more than 100 clients during the 2019 year.

Would you trust a robot to write letters to your customers by analyzing information about them from CRM (Customer Relationship Management) or you would do it mechanically?

25 ответов

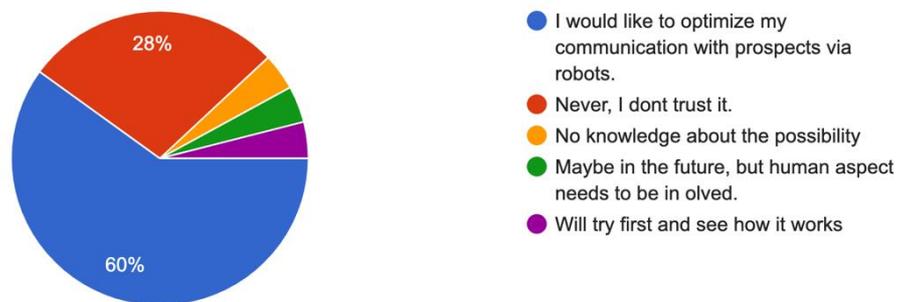


Figure 8. Fifth question answers

This chart shows that 60% of people answered positively to the question "Would you trust a robot to write letters to your customers by analyzing information about them from CRM (Customer Relationship Management) or you would do it mechanically?" or "I would like to optimize my communication with prospects via robots". These answer choices indicate that people are interested in the new automated writing letter process and would like to try and use it in the future. 28% of people answered that they do not want to use this system or they just don't trust it. Such responses may be due to people either not understanding the new service or prefer the manual writing process. The rest of the people are neutrally targeted.

Can you analyze the personality type of the prospect(The Expressive, The Amiable and so on...) by having a conversation?

25 ответов

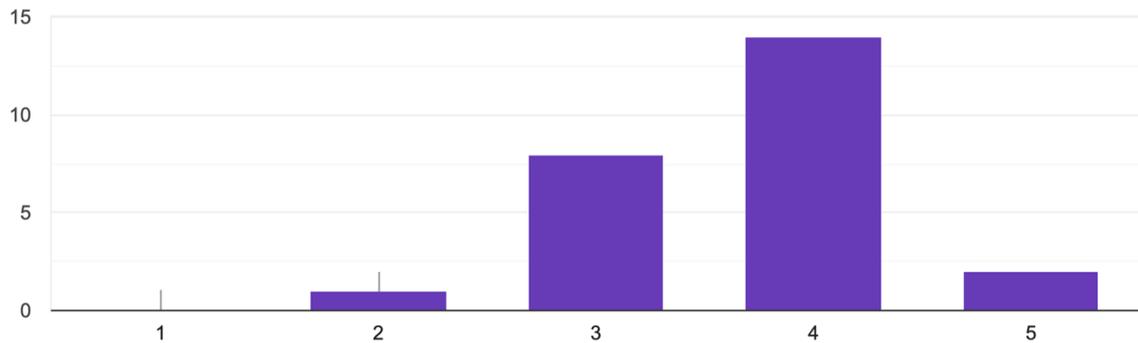


Figure 9. Sixth question answers

The purpose of this question was to investigate how easily salespeople are finding the personality type of prospect by having a conversation. It can be seen from the answers that the majority of people are finding it easy. It can be assumed that people who answered would prefer to trust their gut to decide how they are supposed to sell to specific prospects, but AI opportunities might be helpful as well to them in finding more information about their prospect type.

5 UIpath process of follow-up solution.

The work of salespeople after contacting with prospect is not fully automated. The salesmen have their own convenient methods developed over the years and suitable for them. Most of the time every salesperson has access to a CRM system where they can get all information about customer contact information.

Each employee has a personal email address through which customers can be contacted.

Sales managers send sales offers and other necessary documents via email. How an employee writes customer letters in his or her mailbox is his or her personal activity. Such situations are not in line with the company's value in maintaining a higher level of customer service.

Existing software solutions do not allow to write individual follow-up letters for different types of customers automatically. Most of the time information after sales meeting is the same, but every customer is different and letters must be made according to the type of person. The following section describes the main solution from the author by using UIpath. RPA is going to be used in writing of follow-up letters.

5.1 Filtering Data in UIpath

Every salesperson has their database with clients. Most of the times the most important information is a contact information (Name, Last Name, Email...). From the survey, the author found, that salespeople are easily finding the personality type of prospect by having a conversation. The author realized organized collection of data and stored it in Excel file, which is easily migrating from different CRMs.

	A	B	C	D	E	F
1	Email	Firstname	lastname	Price	Type	Sended
2	nikitavlassenkov@gmail.com	Nikita	Vlassenkov		5 F	No
3	jannnuh@gmail.com	Jana	Schmidt		5 AM	
4	nikitavlassenkov@gmail.com	Andrei	Korolev		5 AN	Later
5	nikitavlassenkov@gmail.com	Jura	Nõmme		5 E	Yes
6	test@gmail.com	Aleksei	Simm		5 E	No
7	test@gmail.com	Kris	Saar		5 F	Yes
8	test@gmail.com	Laada	Kalina		5 F	No

Figure 10. Data in Excel file

On this Excel table the author gave information about potential clients in 6 columns. This table stored “Email” information of customer, “First Name”, “Last Name”, “Price” of potential deal, “Type” means - personality type of prospect (2.4 Different types of people) and “Sended” column is information about follow-up action.

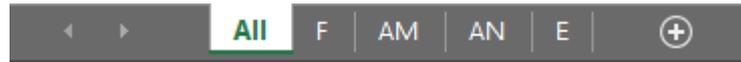


Figure 11. Excel sheets

Excel table has 5 sheets. “All” sheet has all contacts from migrated CRM platform. “F” sheet has contacts information of all “Fighter types” prospects. “AM” sheet has contacts information of all “Amiable types” prospects. “AN” sheet has contacts information of all “Analytical types” prospects. “E” sheet has contacts information of all “Entertainer types” prospects.

5.1.1 Filtering Data from sheet “All”

The author want to filter whole database from sheet “All” to different sheets by type of personality to make overview of potential clients easier for employee by using Uipath. On this process, only one thing is manual for employee is to set a type of personality of prospect in “Type” column.

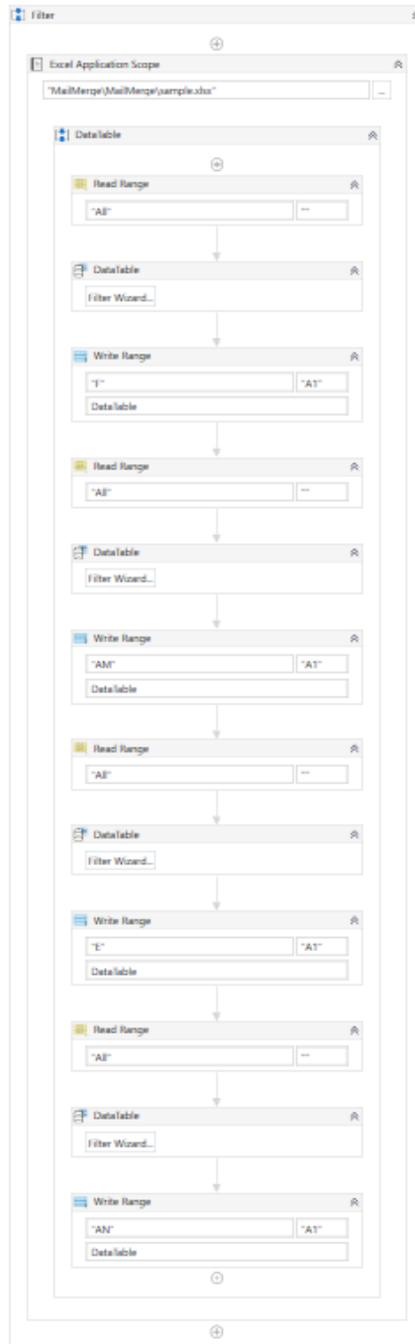


Figure 12. Uipath Filter

The author made a process, which contains “Excel Application Scope” to read excel file.

Data table has 4 different processes of filtering data from sheet “All” to 4 different sheets: “F”, “AM”, “AN”, “E”. “Read Range” is reading whole data in “All” sheet. “DataTable” is filtering data from “All” sheet, and “Write Range” is writing filtered data in one of the types sheet.

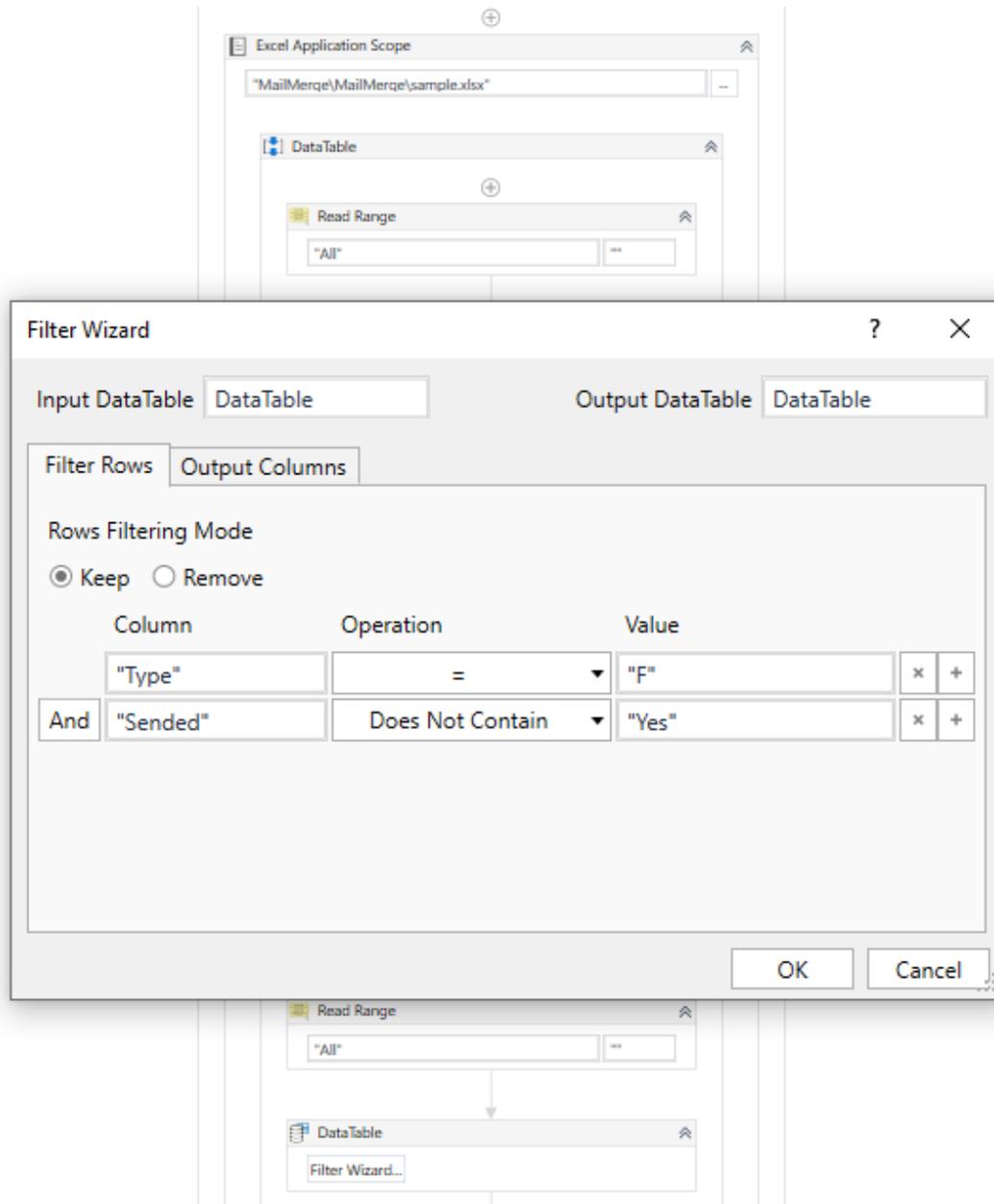


Figure 13. “Filter Wizard”

In “Filter Wizard” the author put 2 filtering modes. This process filtering data by “Type” column and “Sended” information. In that way, all sheets of different types getting updated information of prospects.

	A	B	C	D	E	F
1	Email	Firstname	lastname	Price	Type	Sended
2	nikitavlas	Nikita	Vlassenko	5	F	No
3	test@gmail	Laada	Kalina	5	F	No

Figure 14. Data table of "F" sheet

After using, filter process whole data from "All" sheet is located to different sheets by "Type" and "Sended" information. It does not contain prospect contacts if "Sended" column has value "Yes". This process was made for next step of RPA process.

5.2 Email Automation in UiPath

Existing RPA solution allow to write individual follow-up letters for different types of customers automatically. It has four different bots for four different follow-up letters by type of personality of prospect. On this process, only two things are manual for employee is to set a text file by the type of personality of prospect and information about subject of letter.

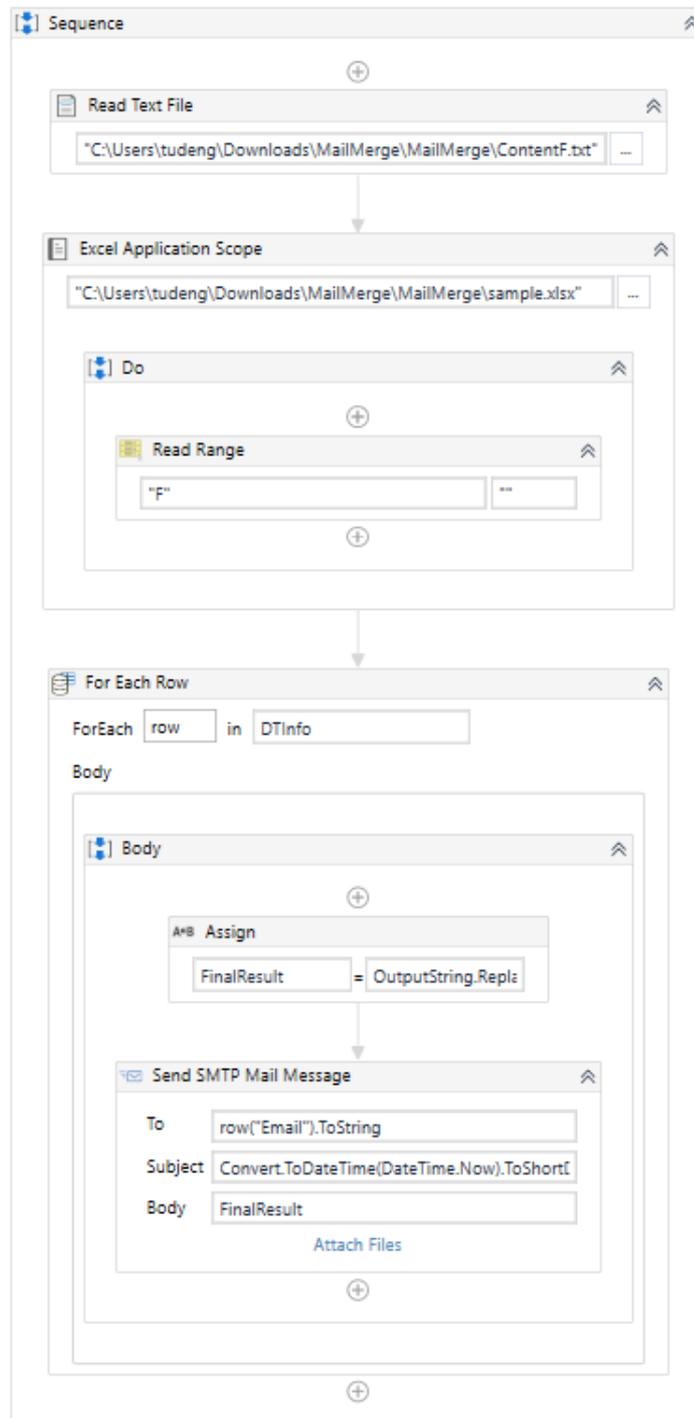


Figure 15. Email Automation for "F" type

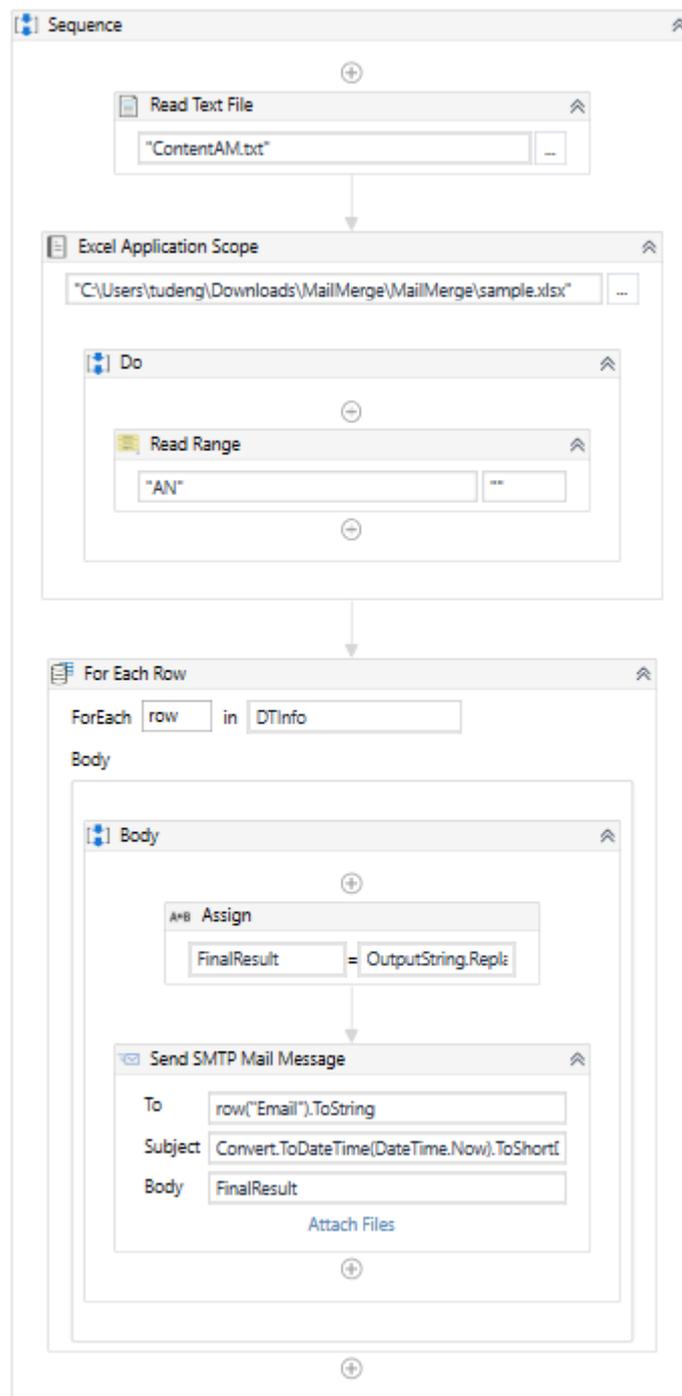


Figure 16. Email Automation for "AN" type

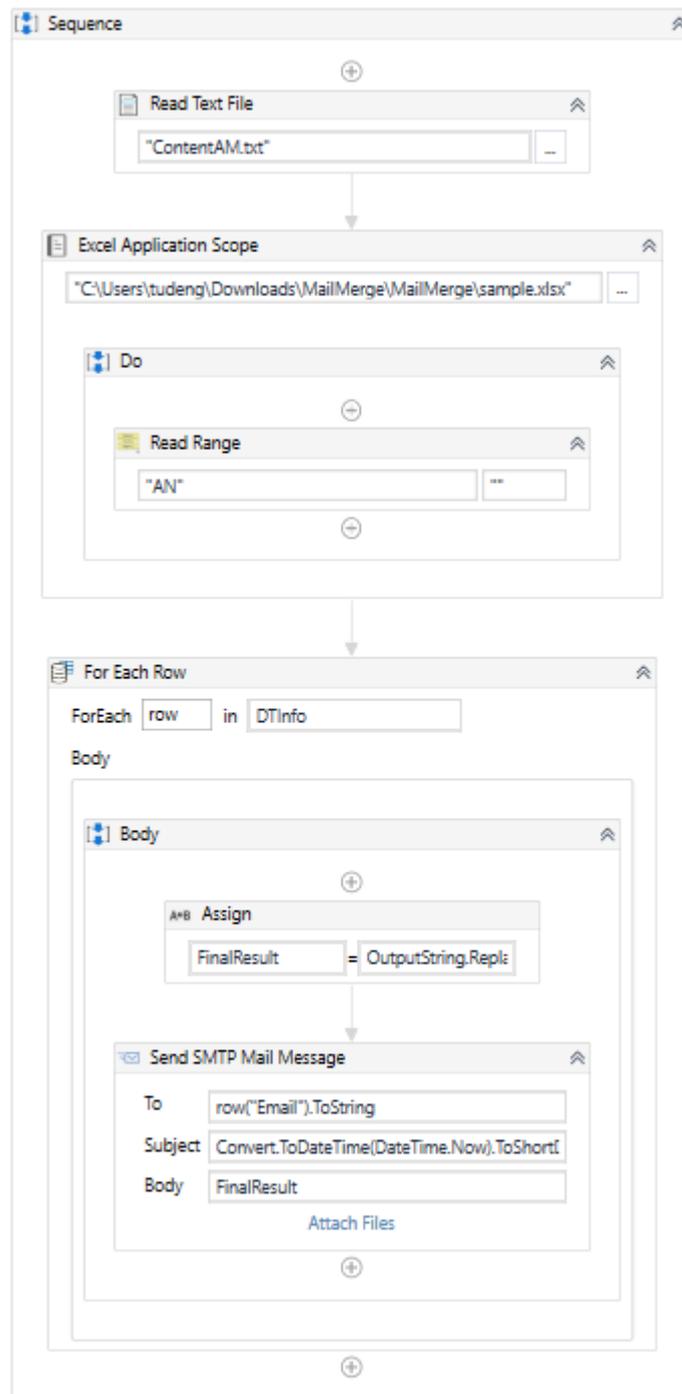


Figure 17. Email Automation for "AM" type

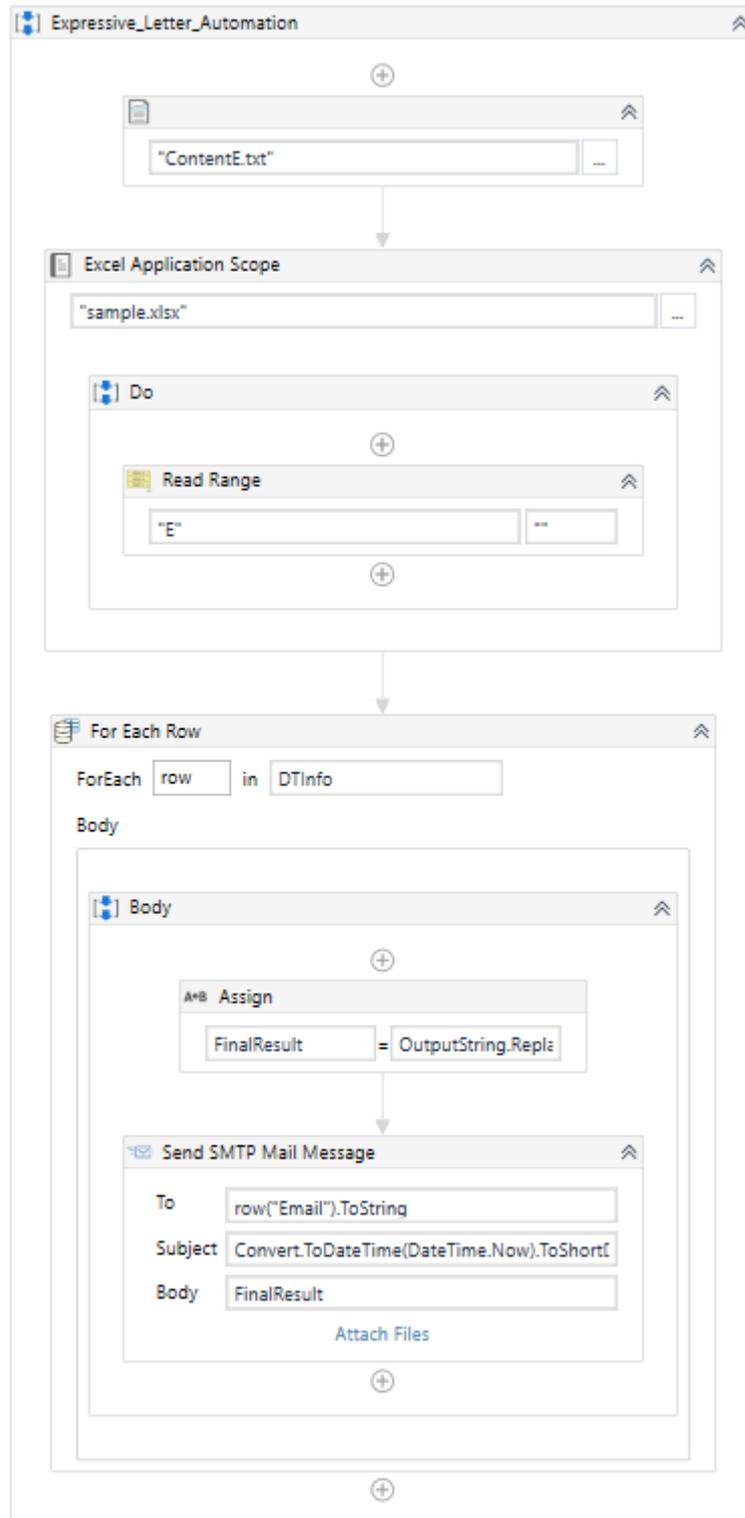


Figure 18. Email Automation for "E" type

The Author made a sequence, which contains three different processes to send email automatically.

5.2.1 Reading Text File

The author chose text file as email body for convenient method.

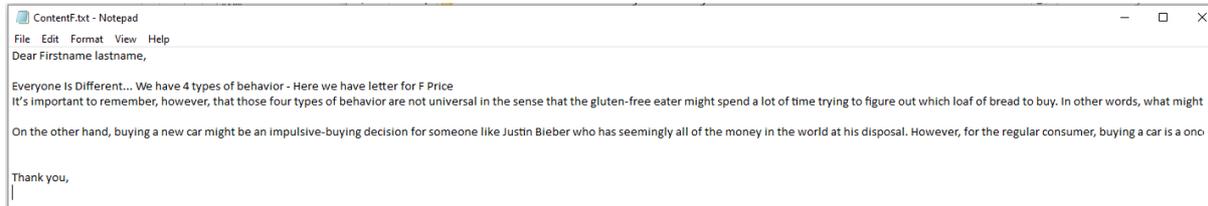


Figure 19. Content of letter in txt file

5.2.2 Excel Application Scope Method

The author made a process, which contains “Excel Application Scope” to read excel file and then to read completely specific sheet on this excel file.

5.2.3 Reading and sending emails

The last step on this process is to read all rows in excel sheet, then to combine txt file into body of email letter and sending emails.

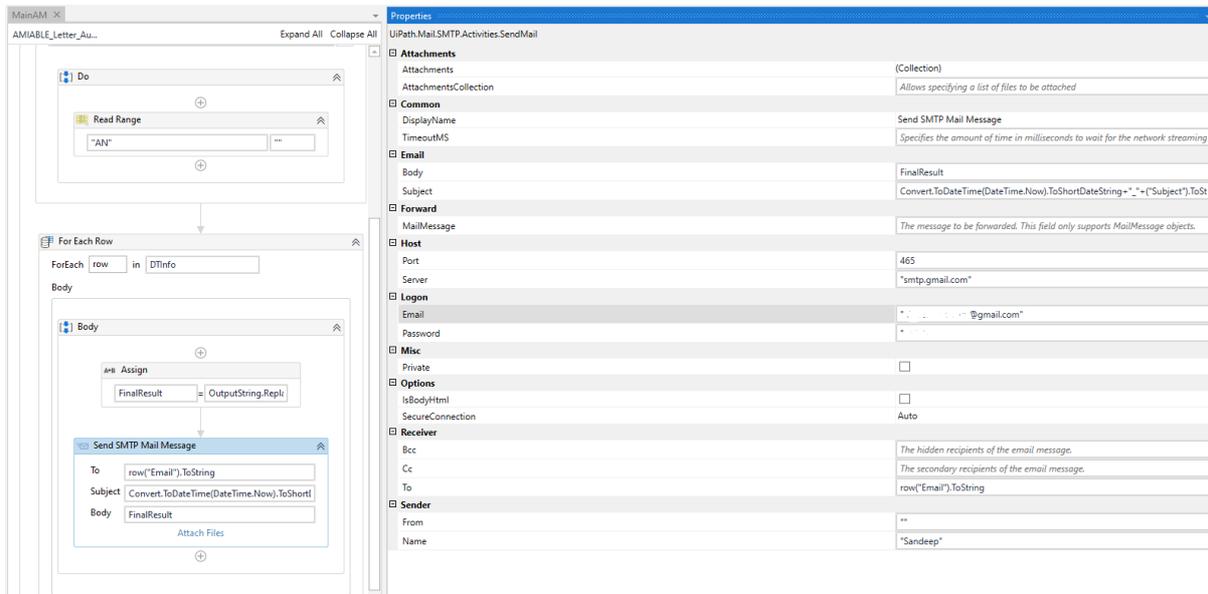


Figure 20. Sending an email

In “Send SMTP Mail Message”, the author has three configurations on writing email. First “To” takes email of prospect from excel column “Email”. Second working with subject on letter. The author made automated date of the day when the letter is send to a potential client and sales person should fill the subject of the letter manually. The last configuration is taking txt file and put it into

body of email letter. The author used guide from UiPath official YouTube channel for understand the SMTP automation. [18]

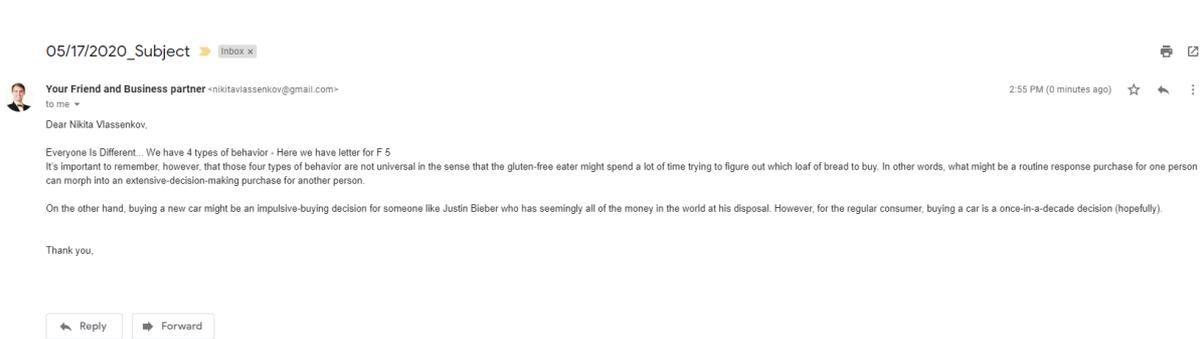


Figure 21. Sending an email from “F” sheet

This is the outcome of the email automation for “F” type process. The process takes a few seconds and this RPA process can easily handle repetitive and high-volume tasks such as writing follow-up letters to many clients. As a result of using it, business leaders would see improvement in productivity with this automatization.

New sales representatives are going to have standardized letters for different types of people. It can reduce time-wasting for thinking about the structure of writing letters.

After using this process user should go to “All” sheet and change data in “Sended” column from existing data to “Yes”. In that way after adding new data from CRM, after filtering, but not going to send emails to people, who got the letters before.

6 Summary

The present bachelor thesis treats the sales process improvement.

The author studied different parts of selling cycle of sale and psychology behind it. The author identified weaknesses in the existing sales process and develop requirements to improve the sales process and increase efficiency.

The author analyzes the process of writing follow up letters by using RPA, having different methods: SWOT analysis and quantitative survey.

In this thesis, the main task was to change sales work to become more effective by using new technologies and automation. The existing process has been automated in UiPath and improved, because new RPA process can easily handle repetitive and high-volume tasks such as writing follow-up letters.

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