

When Sales Meet Process Mining

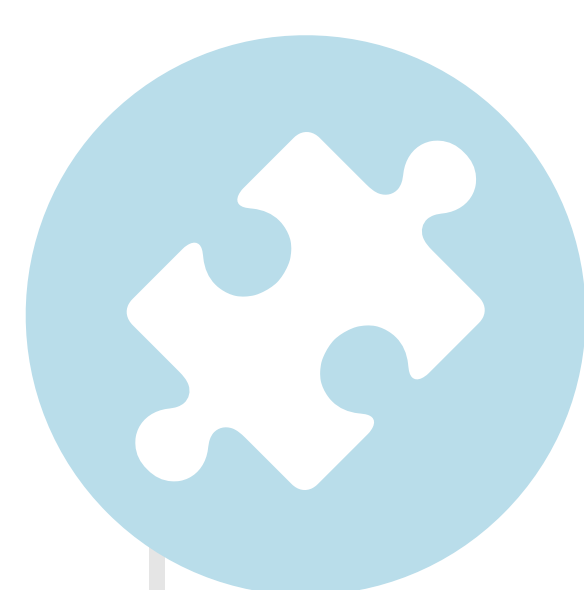
A Scientific Approach to Sales Process and Performance Management

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10: IS Design and Business Process Management

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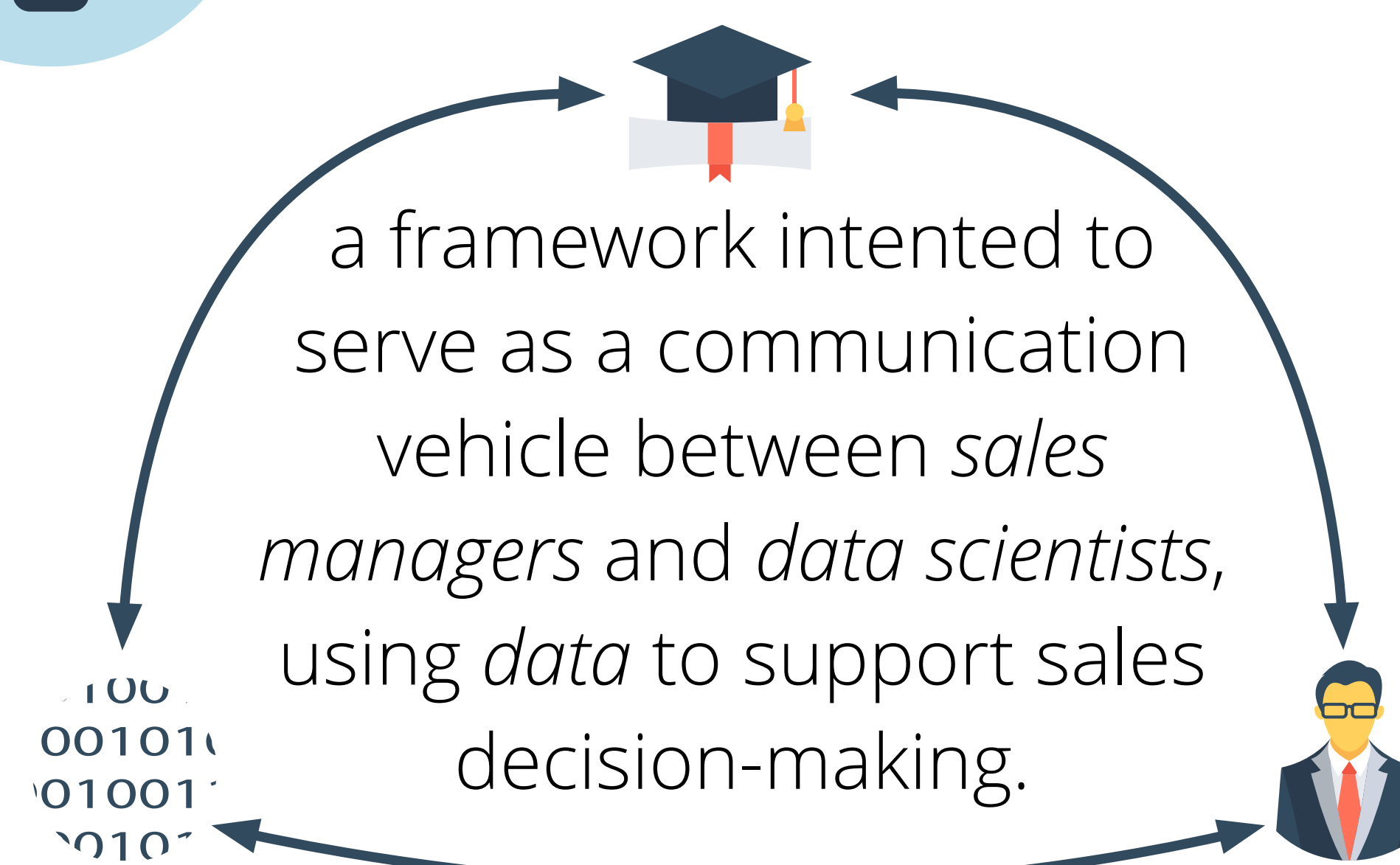


Motivation

- Organizations are shifting from an artistic approach driven by sales reps' interpersonal skills to a more structured approach.
- 90% of sales organizations who have adopted a structured sales approach have better sales result.
- Only 50% of companies have defined structured sales processes, and only 20% are able to monitor them.



Key Idea



Research Questions

Process mining can promote "sales as a science" through its capacity to analyze, discover and enhance end-to-end processes. This motivates our two research questions:

- What are the challenges in managing sales processes?
- How can process mining be used to address these challenges?



Methodology

Design Science Research, Peffers et al., (2007)

Steps:

- 1) Identify and motivate problem
- 2) Define objective of a solution
- 3) Design and development
- 4) Demonstration
- 5) Evaluation
- 6) Communication

Outcome:

- 7 validated challenges (a)
- Framework to apply process mining
- Refined notation for sales (b)
- Implemented solution (c)
- Implementation with real data
- Journal Paper



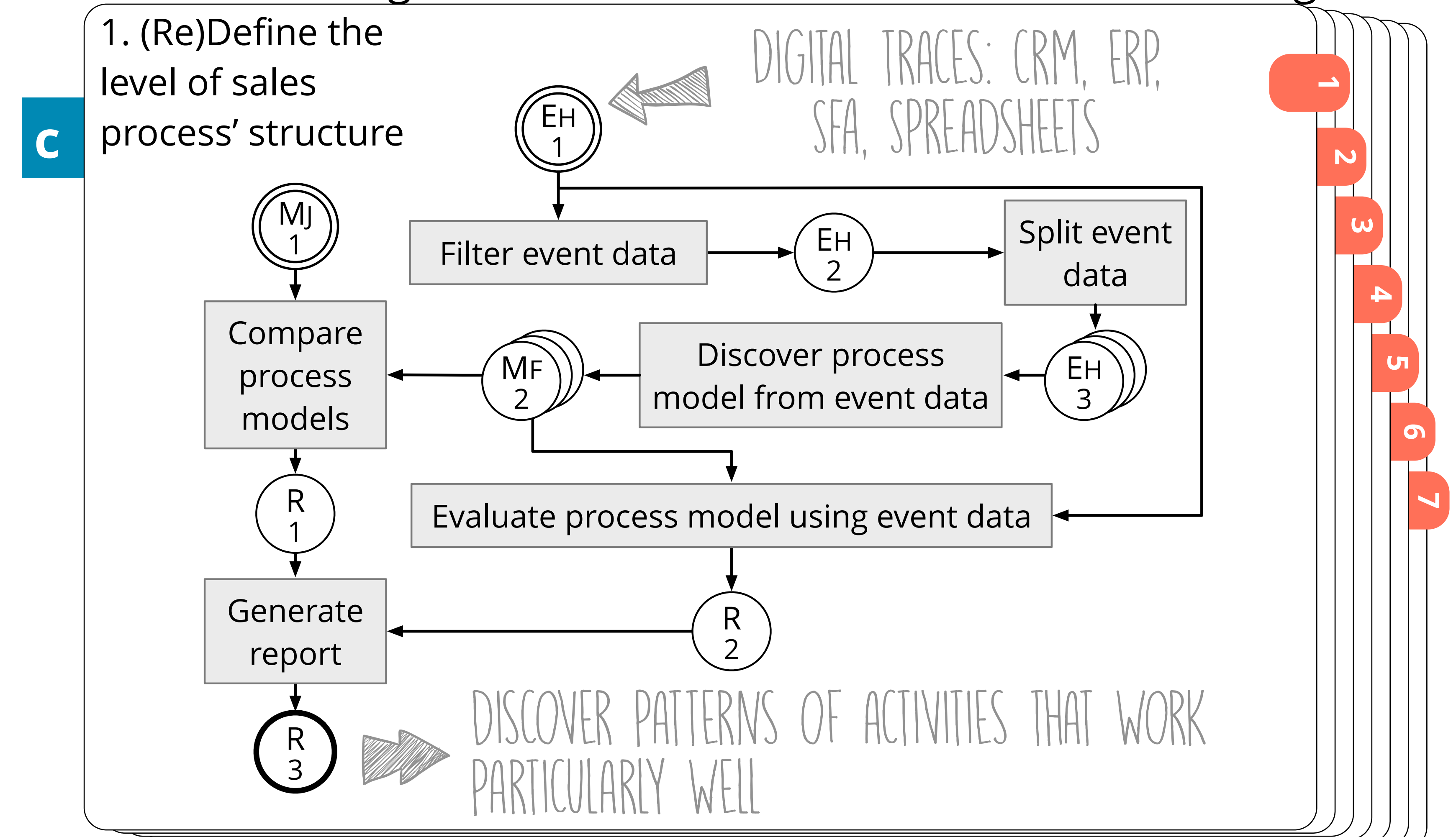
Approach and Contributions

7 challenges

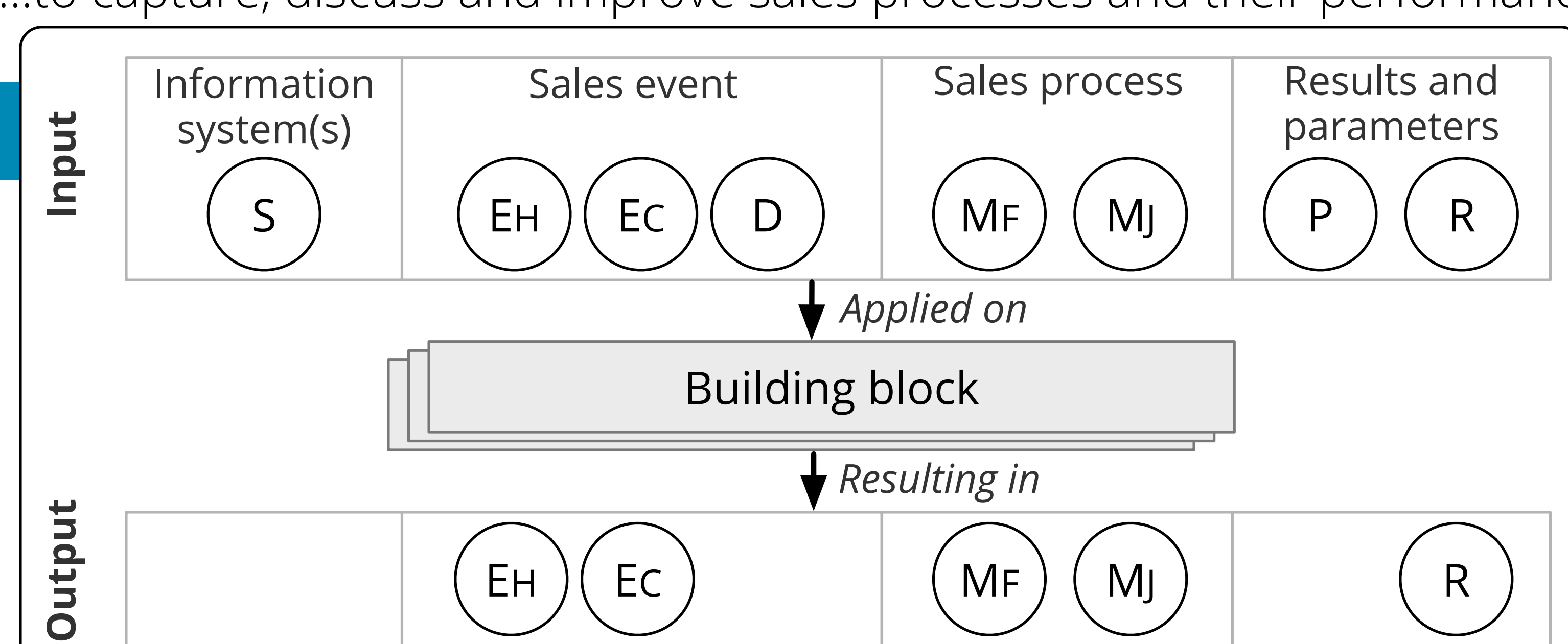
- 1 (Re)Define the level of sales processes' structure ★★★★★
- 2 Provide guidance to sales representatives during sales ★★★★★
- 3 Understand factors influencing sales process variability ★★★★★
- 4 Assess the sales processes' conformity to their process model ★★★★★
- 5 Analyze the efficiency of sales activities and identify bottlenecks ★★★★★
- 6 Identify disqualification criteria to avoid sales representatives spending their time on dead sales ★★★★★
- 7 Identify factors influencing performance ★★★★★

EVALUATION OF RELEVANCE BY 16 SALES MANAGERS DURING INTERVIEWS

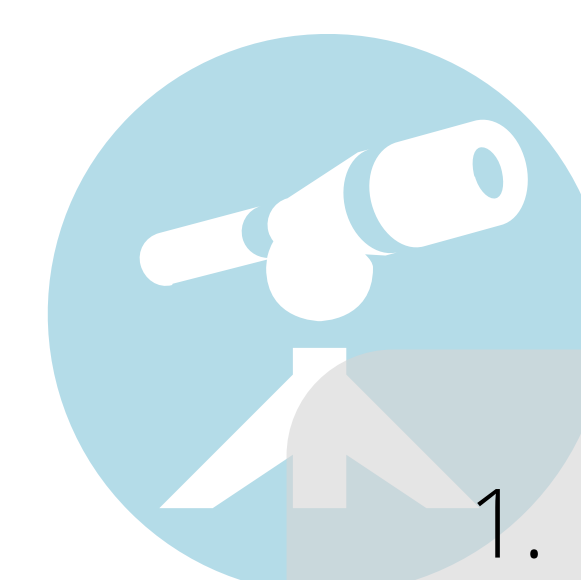
Process mining workflow to address the identified challenges



b



Original notation: Bolt et al., (2015)



Outlook

1. Apply our framework with "real" data
2. Communicate the companies' specific findings to the participants
3. Submit the scientific findings as a full research paper

