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Developing sales and customer process with Lean to improve the company's productivity

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Abstract

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This thesis has been made in cooperation with Metropolia University of Applied Sciences and private health care service provider in Finland to improve the organization's sales and customer process. The purpose of this thesis is to study whether the Lean development method works in the development of occupational health sales and customer processes in company X. Moreover, this thesis examines why it is important to develop these processes from the productivity perspective. The aim is to bring out information that company X can apply to its practical work in the future. The research method was action research which used qualitative research methods. The study was conducted in 2023. It consisted of four Lean workshops that were organized in company X by the researcher and in which employees from different parts of the company X participated. Participants were from the invoicing, sales and customer management teams, among others. After the Lean workshops, the participants were interviewed using a semi-structured interview. The framework of the study contains information about development work in general and sales and customer processes in general. The framework of the study contains general information about development work, sales and customer processes. Furthermore, the framework takes a closer look at the Lean management philosophy. The research resulted in a documented process diagram which have been utilized in company X's practical work and implemented in the company. The process description clarifies how sales and customer service are handled in company X and what things should be into more account. In the company X action research results showed that the commitment of the management were hoped for more towards the development work done in the company. In other words, the development work should be taken into account in company X's business strategy so that the company has a clear outlook of what and how things want to be developed in the future. The Lean workshops were also perceived as useful and they were hoped to continue.

Keywords: Lean, sales and customer process, development

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Contents

1	Introduction	5
1.1	Purpose, aims, objectives	5
2	Literature and knowledge	6
2.1	Sales and customer industry	7
2.1.1	Organizational culture	8
2.2	Development process	8
2.3	Lean	11
2.3.1	Lean method	12
2.3.2	Flow efficiency	13
2.3.3	Lean tools	14
3	Implementation	17
3.1	Method	17
3.1.1	Utilization of qualitative research in organizations	18
3.1.2	Qualitative research data collection methods	19
3.1.3	Data collection	20
3.1.4	Qualitative data analysis	21
3.2	Context	22
3.3	Population	23
3.4	Benefactors	23
3.5	Current state analysis	23
3.6	Progress	25
3.6.1	The first Lean workshops	26
3.6.2	The second Lean workshop	26
3.6.3	The third Lean workshop	27
3.7	Action taken	29
3.7.1	The final workshop	29
4	Results	31
4.1	Trustworthiness	34
4.2	Ethical concerns	35
4.3	Utilization of results/suggestion for future development	37
4.4	Conclusions	39
4.4.1	Follow-up actions	41

4.4.2 Self-assessment	41
References	43
Appendices	45
BODY OF THE SEMI-STRUCTURED INTERVIEW	45
PARTICIPANT INFORMATION SHEET	46
PARTICIPANT CONSENT FORM	51

1 Introduction

Have you noticed that the sales and customer industry has changed in the last years and the change has been fast? Sales is the organization's way of offering services and products to customers. The things we sell to customers has changed, digitalization has begun to be a big part on sales industry, customers are more aware of what they want and which they are entitled to, these industries have become more competitive and more changing year by year. (Laine 2015. 9-11)

1.1 Purpose, aims, objectives

It is important that companies keep up with the change and develop in such a way that they are able to meet the needs of customers however, so that it is profitable for the organization. This thesis was made for a private health care service provider, which is referred to as company X. Purpose of this thesis is to study whether the Lean development method works in the development of occupational health sales and customer processes in company X. Also with the purpose of study why it is important to develop these processes from the point of view of productivity. The aim is to bring out information that can be used in practical work in the future in company X.

All the employees no matter where they work are entitled to occupational health care services in Finland by the Finnish law. Occupational health is mostly preventive and it's created to support employees work capacity for their whole work career, usually the contract also includes the treatment of the diseases (Website of the Occupational Safety and Health Administration in Finland). Occupational health care can be organized either by a public sector or, more commonly, by a private health care service provider. Occupational health services are offered by several private companies and the competition for customers is fierce.

In Finland occupational health care system is quite unique if you compare it with other countries. This system is sometimes hard to understand for companies who have employees in Finland and are entitled to provide them occupational health. Because companies don't always understand why occupational health is mandatory and how it works it's even more important that the process is smooth and meets the customer's needs and that the customer understands what they are buying. (Website of the Occupational Safety and Health Administration in Finland)

The action research was done qualitatively by interviewing company X employees after four Lean workshops they attend in the spring of 2023. Workshop participants were members of different teams of the company X but they all work somewhere in the sales and customer process. The purpose of the Lean workshops was to improve the company X sales and customer process and also study whether the Lean method is suitable for private health care and occupational health care process.

The analysis and results showed that Lean workshops had positive effects on the sales and customer process. Flaws in the process were also highlighted, for example accurate metrics were missing and internal awareness in company X of the whole process was weak. Company X's commitment to the development project and taking the results into practical work were felt to be the most important.

2 Literature and knowledge

In this chapter we discuss the literature and knowledge of the study. The literature and knowledge consists of literature and scientific articles. In the theoretical reference is brought up what are the typical features of the sales and customer industry as well as the development process and the development work carried out in organizations. The literature and knowledge is assembled based on what would benefit action research conducted in the study. I feel that writing the theory about development work and opening up the management

philosophy of Lean supported my action research, making it of a higher quality as a whole. The theory part brought out well how to proceed in the development of prose according to certain steps. The description of sales processes, on the other hand, helped to understand what is important to take into account in that process. All in all, the theory summed up what kind of flow efficiency the sales process should have in order for it to be as productive as possible.

2.1 Sales and customer industry

The market, operating environment and customers have changed in sales industry in last years. Customers' purchasing power has increased and the way of buying has changed. Purchasing power means how many commodities can be purchased with available wealth. The whole sales process is more self-directed, and customers do not want to be disturbed unnecessarily.

Organizations and seller have to develop their old ways to meet customer needs. Customer's requirements are often aimed at the seller and the organization, but all branches of the organization for example marketing and billing must also develop in order to make the purchasing process smooth. (Laine, 2015:9)

Technology and digitization have made it possible for customers to be independent and get a lot of information before the purchase process officially begins from internet (Laine, 2015:10). Today's operations of companies are largely based on information and its management (Ojasalo, Moilanen and Ritalahti, 2014) Customers no longer need a single solution to their problems, but how solutions are sold matters even more to them. About 60% of customers have made purchase decision before the conversation with the seller. This is not only a bad thing but enables the development of the sales industry (Adamson, Dixon and Toman, 2012). The way organization and seller sells matters because customers often feel organizations offer them identical products. Most of the customer cares more about how they are sold than what is sold to them. (Dixon and Adamson, 2011)

Usually when sales doesn't reach the goals, sales activity is increased by the organization for example sellers start to call to the customers. Instead of increasing activity, it would be good to think about how the organization could actively increase sales and that it would be more proactive as a whole. For sales to work proactively, the organization needs good customer understanding. High-quality, relevant and fact-based customer information will be an important competitive advantage for the organization and sales development. (Laine, 2015:14-17)

2.1.1 Organizational culture

The sales and customer industry change requires knowledge of the current state of the industry. In many organizations it is understood what should be done differently for change, but the organizational culture slows down development. Organizational culture is an invisible force that guides people's thinking, behaviour, attitudes and actions. The organizational culture must first be understood in order to bring about change. (Laine, 2015:11-12) Otherwise, even if the functions change, there will be no change in the way people work if they do not understand the reason for the change (Hannus, 2003)

The operating environment is changing rapidly, and organizations are required to carry out continuous development work in order to succeed in the market. Good organizations are those that adapt to change, but the best are those that drive development forward themselves. Such companies are called engines of development. Organizations need constant development work for example for financial reasons. Development can help organization to grow, improve their profitability and entering new target markets. Development work can improve also their operations and processes. It can also improve understanding of customer needs. (Ojasalo et al. 2014:12-14)

2.2 Development process

The development work done for the organization is often described as a process and as in typical of the process, it moves according to certain steps. It

has certain steps and it proceeds in a certain way. The simplest steps are planning, implementation and evaluation. The stages help to keep the development systematic and with the stages it is easier to stick to the agreed schedules. However, sometimes the stages are not easily distinguishable from each other and you may even have to go back between stages. (Ojasalo et al. 2014)

All organizations have different processes, whether formal or not. Processes are needed because the work in the organization is done in processes. In general, all organizations have at least the main processes, such as the sales process, while some companies may have thousands of different processes for all possible functions. (Mådig and Åhlström, 2018:28&29)

The most important steps in the development process are identifying the development target and understanding the phenomenon under study. In the development work done for the company, it is important to think about what are the expectations and what the goal of the development work is. (Ojasalo et al. 2014:22-24)

In her book in chapter two "Kehittämistyön menetelmät", Ojasalo et al. presents eight steps of development work. Defining the researched phenomenon and the goal is actually the first of eight steps in the development work process. Important in the first step is to identify the organization's development needs although the development work usually comes as a given from the organization. The development work can be problem-based or based on the need for reform. Problem-based development work looks for a solution to a specific problem, for example system malfunction. While renewal-based development work like this thesis aims to develop a certain function in the organization, such as a new process. When the topic of the development work is clear, preliminary goals can be set for it. The final goals often only come when more information and data related to the phenomenon under study can be collected. (Ojasalo et al. 2014:26-32)

In the next steps, we start looking for information regarding the phenomenon under investigation and define the development work. Acquiring background information is really important so that you don't accidentally start developing the wrong things. Good development work requires knowledge of the company and the history and current status of the process being investigated. After this, it is precisely determined what the development work is aimed at. Development work is often difficult to define and is often given too big and overarching goals. Development work should be defined in such a way that its goal is clear and possibly even monitorable with different metrics. Good indicators are, for example, sales figures or customer satisfaction (Ojasalo et al. 2014. 28-33)

When the development work has a solid database, the development approach can be chosen. These are steps four and five of eight steps of development. In the database, the most important theories and models related to the studied phenomenon are brought out. Theories and models help to find the key concepts for development work. The concepts help e.g. in communication of development work, finding a right development approach and structuring the phenomenon. The right development approach is comprehensively related to the goal of development. Different approaches are, for example, case study, action research, constructive research, service design and innovative production. The development work ultimately determines the best approach. (Ojasalo et al. 2020:34-39)

The last three steps are mostly activities that support development work. Think about things like what kind of information and what information is needed about the development work and what kind of methods supporting development work could be used to collect such information. Different development work methods are, for example, surveys and various interviews. In development work it is important to remember that it is a social event that requires discussion and interaction to get the best results. Even better if customers, employees and other stakeholders can be involved from the beginning of the development work, in which case everyone's needs and wishes regarding the work can be taken into account (Toikko and Rantala, 2009).

After the development work is done, there is still the sharing of the results and the evaluation of the development work. It is good to think about both of these through the development work before giving the final report (Ojasalo et al. 2014:40-49). The evaluation of the development work is its own process. In the process, the planning, organization and implementation of the work is evaluated. Finally, the results of the development work will be presented. Presentations take place more commonly in various seminars or reports. (Toikko et al. 2009:82&85)

2.3 Lean

When talking about Lean, we must mention Toyota Motor Corporation and Toyota Production System (TPS), which has been the foundation of Lean management philosophy. It all started when Toyota could not afford wrong investments because of the bad economic situation after the Second World War, so Toyota developed their own production system TPS and started to invest in understanding the needs of their customers more than resources. What, when and in what quantities the customer wants the product? Toyota saw flow as their production process and this is where the term flow efficiency originated. (Mådig et al. 2018:69)

Toyota tried to get rid of anything that could potentially reduce flow efficiency and maximize the chain of value-producing activities. These slowing factors are called in Lean “waste”. They identified seven different waste in their processes: unnecessary production, unnecessary waiting, unnecessary transportation, unnecessary work, unnecessary storage, unnecessary movement of employees and unnecessary errors. (Mådig et al. 2018)

Toyota and TPS have received a lot of praise and have been studied to improve company productivity. Due to a lack of resources, Toyota was forced to focus on customer needs and develop its flow efficiency and eliminate unnecessary waste. This is the core of the Lean management philosophy. Today Lean is also

used a lot in industries other than industry, for example procurement and sales. (Mådig et al. 2018)

2.3.1 Lean method

Lean is based on the thought to improve the flow efficiency of various processes. With lean, the company can reduce the additional work of employees and stop unnecessary waste (Mådig et al. 2018). Lean means shortening the required time and making the time we need more predictable. The way to reach the desired result is based on research for many years, and on the other hand natural laws (Torkkola, 2015).

Lean thinking is a management philosophy and operational strategy originally developed in Japan. The idea behind the Lean management philosophy is to eliminate processes that are so-called "wastes", i.e. to eliminate unproductive activity/activities and to simplify activities. By removing these "wastes", the aim is to improve service quality, improve efficiency and customer satisfaction. (Torkkola, 2015) The goal of Lean is to minimize the loss of sales and invest in things that generate value for the organization and the customer. (Laine 2015:14-17)

Lean recognizes eight forms of waste waiting, over/under production, unnecessary motion, over/under processing, defects, unnecessary transportation, excess inventory and unused creativity of team members. There are three kinds of waste Muda, Mura and Muri. Recognizing the loss is a way to raise the issue. Eliminating waste aims to create value for the customer and improve flow efficiency. (Mådig et al. 2018)

Lean is not only procedures and tools. The best results have come when it is part of the company's management philosophy and operational strategy. Lean is therefore a strategy for achieving goals, to support which various methods and tools have been developed. Operating models and tools are, however, an essential part of Lean. (Mådig et al. 2018)

2.3.2 Flow efficiency

Flow efficiency is an essential part of the Lean method. In addition to flow efficiency, there is also another form of efficiency so there are two types of efficiency in the world. The most traditional of these is resource efficiency and the other is flow efficiency which Lean is based on. Resource efficiency aims to utilize all resources as well as possible for example, this has been used a lot in industrial sector, where tasks have been broken down into smaller parts and given to different functions of the organization to work with. The other's characteristic feature of resource efficiency is that one function of the organization repeatedly performs similar work. The unit of measure of re-source efficiency is how much a resource is used relative to a certain period of time. Flow efficiency, on the other hand, focuses on an organizational unit and customer and is measured as the processing of flow units in a certain period of time. Usually the shorter the lead time the better. Good processes are needed for flow efficiency. (Mådig et al. 2018:7-16)

The word process comes from Latin and means "moving forward". Moving forward means refining or developing something. In Lean, the one who moves forward is also called a flow unit. Flow unit can be material, information or person. If you want to understand the flow efficiency, you have to create the processes by looking at the flow units. Lean and flow efficiency focuses on how much value a flow unit gets from each organizational resource. (Mådig et al. 2018:17-21)

In the process, you can define its start and end. This is important to be able to measure the lead time. The process consists of different stages through which the flow unit progresses. The stages of flow efficiency include, for example, value-producing activities. Value-producing activities refer to those activities during which the flow unit develops in some way. In order to recognize the value, the need must be known, in order to know the need, it is necessary to know and define who the customer is. There are two types of needs: an immediate need, which is usually something concrete, and an indirect need,

which is more the subjective experience of the customer. (Mådig et al. 2018:22-28)

In order to find the reason why the organization does not reach the best flow efficiency, we need to understand the laws of Lean. Lean includes various laws that emerge in the processes. According to Lean Little's law the turnaround time depends on the time spent on a single work task and the amount of unfinished work. The second law is based on the bottleneck phenomenon where the steps of the process that limit the throughput are studied. According to the law of bottlenecks, the more bottlenecks, and the longer the lead time. The last law is about the effect of variation on processes. Studies show that the greater the variation in the process, the longer the lead time. Based on these laws, we are able to do different things to improve flow efficiency. (Mådig et al. 2018:34-45)

A book "The machine that change the world" was published in 1990. The authors of the book James Womack, Daniel Jones and Daniel Roots showed in the book with their study that Toyota reached a better efficiency level than its competitors. According to them, Lean consisted of four areas: teamwork, communication, efficient utilization of resources and elimination of waste, and continuous improvements. (Mådig et al. 2018)

Nowadays, there are several different definitions of Lean and Lean is no longer as strongly associated with Toyota as it was before.

2.3.3 Lean tools

The efficiency matrix helps us understand where our organization is located on the matrix and which definition of Lean is best for us, especially if the development work is not about mass production. In the efficiency matrix there are four different places where the company can be located: Efficient Island, Lean (The perfect state), Wasteland and Efficient Ocean. Upper left corner Efficient Island means that the company has high resource efficiency but low flow efficiency in services, this often means a long waiting time, which does not bring value to the customer. Lower right corner Efficient Ocean towards it

means high flow efficiency but low resource efficiency in this place the customer is the most important. Wasteland is in the matrix a place that many companies do not want to be in. There bottom left corner, both resource efficiency and flow efficiency are low. Upper right corner Lean is the perfect state. There, the resuspension efficiency of the company is as high as the flow efficiency. It's really hard to get to this level, but at this level everything works In addition to these, the efficiency matrix distinguishes whether the company has low or high resource and flow efficiency. (Mådig et al. 2018)

Companies can be located anywhere on the matrix. The most optimal space for the company would be in the upper right corner. In practice, however, it is impossible to get here because it would mean that the company would know all the current and future needs of its customers and company resources should be fully reliable and flexible even in rapidly changing situations. (Mådig et al. 2018)

How to place a company on the efficiency matrix? Organizations can themselves choose which part of the matrix they would like to enter. However, in order to get to the state they want, companies must take into account that getting there is affected by the company's strategic choices. Company`s business strategy determines what kind of value the company wants to give to its customers and what things the company wants to focus on. The location of the company can also be changed with the matrix if there are changes in resource or flow efficiency. (Mådig et al. 2018)

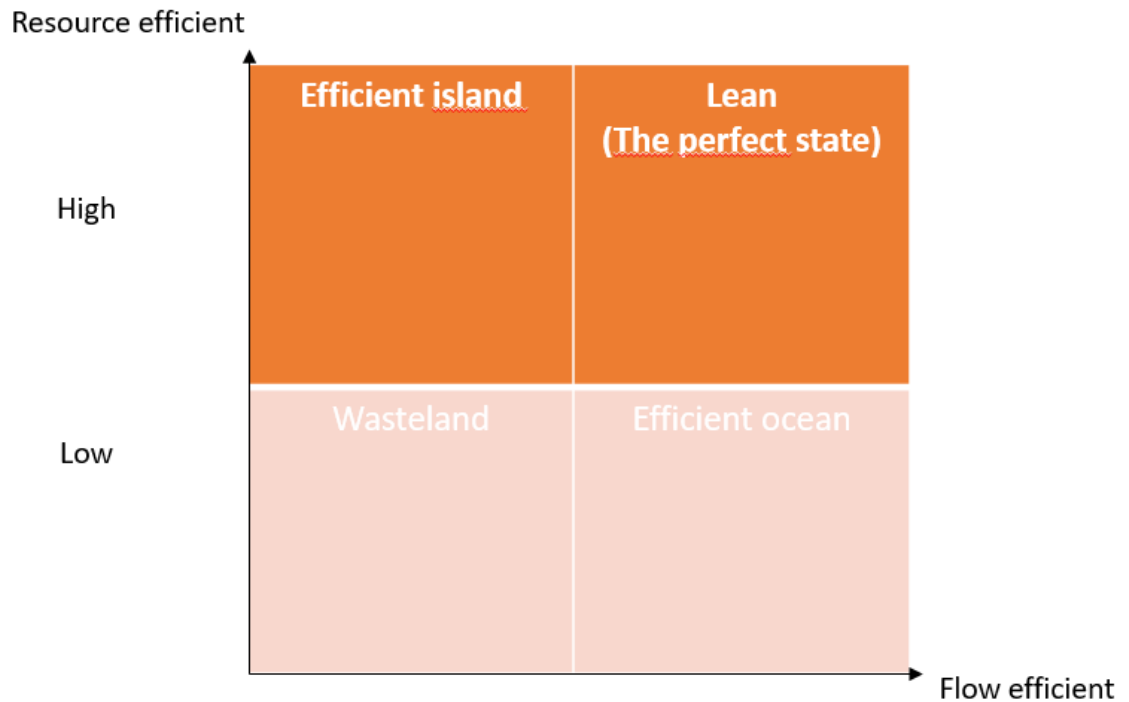


Figure 1. Efficiency matrix

A3 Problem- Solving- A Resource Guide is a Lean method where all the most essential things are recorded on A3 size paper. This tool has strong roots in Toyota. A3 includes background, current conditions, goals/objectives, analysis, proposed measures, implementation plan and monitoring. A3 guides thinking and since the method is visual it helps to keep things logical. (Torkkola, 2015)

Gemba walk is a Japanese word which means the most valuable place and according to Gemba, the most valuable place is where practical work is done. Gemba walk is a method of Lean and the purpose of Gemba is to familiarize better with the process being studied by going on site and getting to know the practical work and how the pro-cess works. (Mådig et al. 2018)

One of the most famous Lean tools is value stream map. Value stream map visually describes which things generate value for the customer. It also calculates the total time spent and points that could generate more value to customers. There are typically two value stream maps one from the current state and the other from the target state. (Torkkola, 2015)

3 Implementation

3.1 Method

Scientific research can be either quantitative or qualitative. However, both scientific studies aim at the same goal that planned and systematic information is produced using approved methods. The chosen research method should fit the phenomenon under investigation and the research questions set for it.

(Silveman, 2014:6-10)

Qualitative research method has been used in this thesis research. The greatest strength of the qualitative research method is that it allows you to study newer phenomena for which there is not so much data yet. (Silveman, 2014)

When we do develop work it is important to identify different development methods and know how to use them. Rapid changes in the operating environment challenge companies in a new way but also bring opportunities. One big competitive factor nowadays is innovation. Innovations can be technology-led innovations or social innovations. Social innovations mean ways of working, new practices and changing practices into routine. Companies are required to constantly renew themselves and be agile. Method knowledge helps companies to be innovative, renew themselves and agile. Method knowledge consists of different knowledge and skills. Good method knowledge helps to limit the development work to the most essential. Method knowledge also includes presentation of results with the help of documents and presentations. (Ojasalo et al. 2014)

This thesis has been carried out with qualitative research method. Qualitative research is a type of scientific research whose try to understand the phenomenon under investigation. The goal is to create a new theory and get to test it. The purpose is to follow the traditions of scientific research methods: when the theoretical reference framework is set, philosophical questions are considered and an answer to the research problem is sought. The results of

scientific research are often presented in the scientific community's research publication. (Ojasalo et al. 2014)

Qualitative research is a big research field which can be approached from many different perspectives. In continental Europe and the United States, the approach is also different.

Qualitative research is concept sensitive because it is where you work and interact with people. It is complicated by the fact that both the researched and the researcher have a unique and subjective experience of social reality one of the characteristics of qualitative research is that it is based on the subjective experiences of individuals and their re-view. In qualitative research, theories are not formed so much as exemplary data about how the phenomenon occurs in reality. The occurrence of the phenomenon in reality can also be called a theoretical generalization Theoretical generalization can be used in research like theory. Qualitative research is bound to time and place. (Puusa, 2020:59&101)

3.1.1 Utilization of qualitative research in organizations

The use of qualitative research methods in organizational and management research began to become more common in the 1970 century and in recent decades qualitative studies have increased significantly. It has been scientifically proven that this has increased the theory and methodology possibilities in research. (Toikko et al. 2009)

Qualitative research is important in organizations because the topics are often invisible and abstract. They must be studied by familiarizing oneself with the interaction between people and the study of interaction. (Toikko et al. 2009)

Along with qualitative research, organizations have also started to do more cultural research on organizational culture. (Toikko et al. 2009)

3.1.2 Qualitative research data collection methods

Qualitative research has a goal towards which the researcher wants to progress. The goal affects what kind of material the researcher wants to collect. It also affects how the collected material is interpreted and understood. There are different qualitative research data collection methods. Each method has its own characteristics, strengths and weaknesses. A good researcher knows how to choose the best data collection method based on what is most appropriate and best suited to the situation and goal. (Puusa and Juuti, 2020)

The most used qualitative research data collection methods are interviews. As a method, interviews focus on people's thinking and consciousness. The method aims to collect information on the basis of which plausible conclusions can be made regarding the phenomena under study. The interview always reflects the subject's subjective experiences, while the analysis of the interview itself reflects the researcher's subjective thinking. Research conducted as an interview is a social construction. Social construction means interaction through different actors and the phenomenon that is the object of research. Different interview styles are structured, semi-structured, theme interview, open interview, in-depth interview, reflective interview and group interview. Interviews can be held face-to-face or remotely, for example by phone call (Puusa et al. 2020:103-111)

In this thesis has been used semi-structured interview as a qualitative research data collection method.

Semi-structured interview

In qualitative research it is always customary to justify why a certain data collection method was chosen for the research. The interview was chosen as the method because there was a lot of interaction with people in the research especially during work-shops. (Puusa et al. 2020)

Semi-structured questioning was chosen as the method because we wanted to get possibly new information from the participants in the workshops. The participants also came from different groups, so it was believed that more information would be obtained with open-ended questions (Puula 2020). The subject area was also quite new and because of that structured interview seemed like too restrictive a method. (Ojasalo et al. 2014:41)

In semi-structured interview the questions are have been prepared in advance and they are the same for everyone. Questions are based on previously acquired theoretical knowledge. However, the answer options are open. Open answers also make it possible to bring out something that the researcher has not thought of herself. (Puusa et al. 2020)

Theme interviewing was another method I thought of. In a themed interview, the questions and answer options may change as the research progresses. However, this method was eliminated due to lack of time and resources. Also we wanted to keep the subject area limited, and it was feared that a themed interview would make the research too sprawling. (Puusa et al. 2020)

3.1.3 Data collection

Interviews can be held face-to-face or remotely and in this research the interview was carried at company X's premises or remotely via Teams. An invitation to the interview was sent to each participant separately by e-mail after the workshops. The interview was semi-structured and included four questions that the participants could answer openly what they wanted to bring out.

I also used observation as one data collection method. It is one good data collection method in qualitative research if you want to know more about how people act in certain situations (Hirsjärvi and Hurme 2009:212). During the action research, I observed, among other things, how the participants practically do their work.

3.1.4 Qualitative data analysis

In qualitative research, the analysis starts already at the procurement stage. This is because the researcher's preunderstanding greatly influences the acquisition of the data and for data analysis. For this reason, it is important that the researcher understands in advance the knowledge and belief she has on the subject (Puusa et al. 2020). It is important to avoid forming opinions or hypotheses before the results have been analysed (Silverman, 2014:110).

The analysis aims to understand the phenomenon under study and to create possibly new information. There are different ways of analysing qualitative research data for example content analysis, grounded theory and narrative analysis. Content analysis is better known in quantitative research, but it can also be used in qualitative research. In content analysis, categories are created based on the collected data, which are numerically marked with the number of times something appears in the data. A grounded theory is a well-explained explanation of the phenomenon under study that has been discovered at using the scientific method and has been repeatedly confirmed through observations and experiments. Grounded theory is inductive, that is, on the basis of scientific research, the aim is to make a generalization or theory out of the phenomenon under study. The subject of narrative analysis can be, for example, a text or an interview. In narrative analysis, the data to be studied is broken down with the help of concepts, terms and perspectives related to narrative and narrative theories. In narrative analysis, core narratives or type narratives are often created, which can be used to show what kind of general ways of thinking and acting, meanings and attitudes are related to the things that are the subject of the narrative. (Silverman, 2014:115-129)

This research was analysed by content analysis. The data has been reviewed by examining its similarities and differences. The material to be analysed is written material collected on the basis of interviews. Content analysis is a text analysis, so the researched material must always be written. Content analysis

helps to get a summary of the phenomenon under study (Puusniekka and Saaranen-Kauppinen 2006).

3.2 Context

It is based on four workshops that were organized in the spring of 2023. Each workshop lasted three hours and was organized in the organization's premises. The workshops were approximately every two weeks. The purpose of the workshops was to improve the organization's sales process. People from different teams of the organization participated in that workshop. There were people from sales, the customer team, invoicing, nursing staff and IT.

In the first workshop the participants introduced themselves and went through their work tasks. We felt it was important to understand what role everyone played in the sales process. In all four workshops we had two facilitators who ran and designed the work-shops. Facilitators are also responsible for the participants reaching the set goal together with different methods. In these four workshop we only used Lean method.

We think about the working group's goals and general goals for the development of the process. Next the list what people from the workshops brought up: Superior customer experience, minimization of invoicing errors, clear contracts, internal cooperation, understanding of what one's own actions affect the whole, how to make buying easy, consideration of root causes, smoothness, s, automation (especially the right automation), agreed game rules, moving things forward and introducing them to teams as well. In the first workshop In the first workshop we used Lean method called Gemba. Gemba is Japanese word and means way of working, where we go to examine the problem in practice. In our workshop this meant that we went through the sales process from start to finish.

In the first and in the second workshop we focused for finding and recording wastes in the sales process. We wrote the wastes on the wall with a post-it

notes. We archived everything in OneDrive, where we had created a common folder for our group.

Research questions were

1. How important it is to develop occupational health sales and customer processes?
2. Does lean work as a development method in the health sector?

3.3 Population

The population of the study was company X's seven employees who participated in Lean workshops. All seven participants were offered the opportunity after the workshops to participate in a semi-structured interview live or in Teams. The researcher interviewed each one individually. The interviews were analysed and finally the results were published anonymously.

3.4 Benefactors

Before starting the development work and the workshops, we mapped out the needs of company X and its customers. The feedback came mainly verbally and by e-mail, after which we built the framework for our development work and Lean workshops based on them. The management of company X had also set certain goals for the development work. The management's wish was mainly for an improvement in sales figures and a decrease in complaints from customers.

3.5 Current state analysis

This thesis is based on action research done in cooperation with company X. Action research the emphasis is on getting new information about the phenomenon being studied, but also on changing the practical work. Action research is often used in the development work of organizations, and it is

important to involve the company's employees in development work and to get interaction between the participants (Ojasalo et al. 2014:37).

The request for the development of developing sales and customer processes has come from the management team of company X due to sales results and customer complaints. Action research include planning, implementation of four workshops, collecting data and documenting the results and presentation of research results. The action research utilized the Lean management philosophy because after we had charted what we wanted to develop we thought what would be the best development method for our development work. We decided to use Lean method because research show that Lean is a working method when we want change some function, process, etc. in the organization (Torkkola, 2015). Lean was also selected as a method due to the researcher's own interest and expertise.

Researcher was responsible for organizing a workshops in company X. As a researcher I hired another facilitator with me to help organize the workshops, who was also an employee of company X and part of the process being developed. In the end, we had a pretty free hand in planning and implementing the workshop. We started by opening the company X development process (Figure 2.)

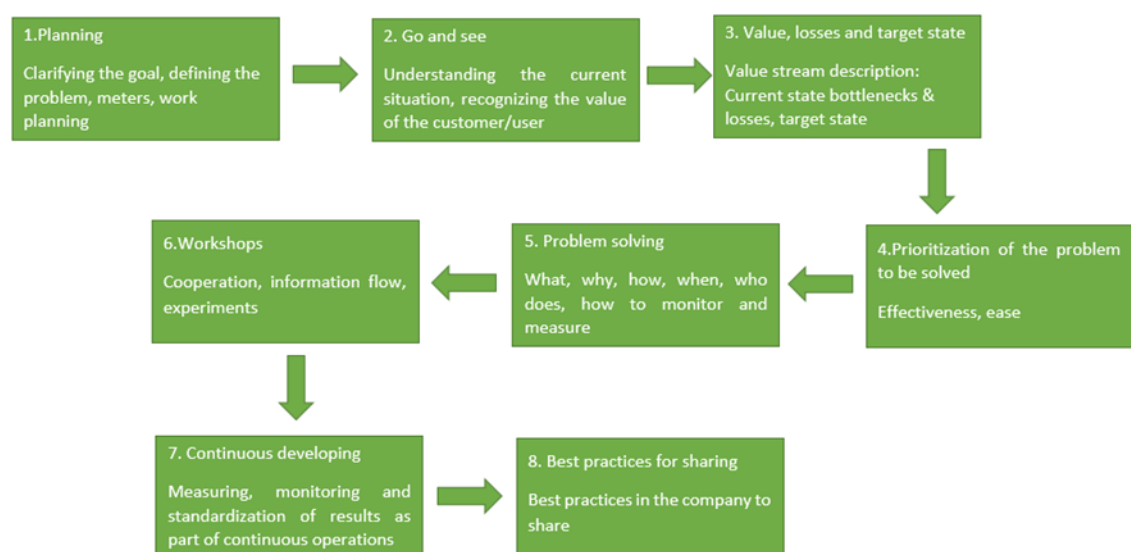


Figure 2. Company X development process opened with Gemba

To open the company X development process we used Gemba walk and the purpose of Gemba walk is to familiarize better with the process being studied sales and customer process of the company. So we went to see the practical work in company X and wrote down our observations and other people's withdrawals.

Company X development process had eight steps. Each step had a title and a more detailed description of the content of the step. The eight steps were: Planning, Go and see, Value, losses and target state, Prioritization of the problem to be solved, Problem solving, Workshops, Continuous developing and Best practices for sharing. The first two steps focus on data collection and planning, it is important to understand the company's current situation and needs before starting development work. In the next steps, the focus is on solving the phenomenon under study and thinking about possible further development steps and how the results can be used in practical work.

After we opened company X development process and after we had done the first step, planning we started to plan who we would include in the development work and work-shops. It was important to involve people from different stages of the sales and customer process to get as comprehensive a study of the phenomenon under study as possible. When we had decided the workshop participants and company X had agreed to resource them for development work we scheduled the four workshops to the calendars of all participants.

3.6 Progress

We used Lean method in all our workshops. Lean is actually management philosophy where efforts are made to make operations more efficient by reducing unnecessary aspects of the processes. This thesis was born from the need of a real company to develop its sales processes. There wasn't any ready-made development methods of operation, but the development work was given completely free hands. Nothing completely similar and concerning the same

subject area had previously been done in the company X. The aim of such research development is to solve problems arising from practical work and to create new practices. Research development requires active interaction with participants and the use of different methods. To support the research, information is collected systematically and critically. Presenting the work to different target groups moves the development work forward. (Ojasalo et al. 2014)

3.6.1 The first Lean workshops

In the first Lean workshop each participant introduced themselves and told their job description and how it relates to the sales and customer process being developed. We also collected the expectations and wishes of the participants regarding the development work. Moreover we agreed on how often and where we would meet. We came to the conclusion that it was good to keep the workshops as close together as possible so that the things discussed are not forgotten and the workshop would be held in company X's premises. In the end, the workshops were about two weeks apart. In the first workshop we also went through the terms used in the process because it is important to talk about the same thing in development work.

All workshops were documented and all the material was saved on OneDrive, where we had a common group and which all participants had access to. Permission had to be requested from the researcher to access the folder in order to protect the material. We agreed that all participants could use the material freely for internal purposes of company X, but for anything else permission should be sought from the researcher. Material that we felt others would also benefit from would be added to the entire company X shared OneDrive workspace. For daily conversation we used Teams or e-mail.

3.6.2 The second Lean workshop

Second Lean workshop focused on step three in the development process value, waste and target state. We also went through the current state of sales and customer process

and value recognition. Together with the participants based on these we listed things that would be realized in the target state.

The target state listed in the second Lean workshop:

- Superior customer experience
- Minimizing billing errors
- Clear contracts
- Internal cooperation
- Understanding how your own actions affect the whole process
- How to make buying easy for customers
- Thinking about the root causes
- Fluency
- Automation (especially properly done automation)
- Agreed game rules internally
- Moving things forward and introducing them to the other as well in company

After we had listed the target state we defined the customer of our development work. The final customer for the development work was new customers and current customers of company X.

Finally after defined the customer, we went through what kind of metrics we have in use in company X and what kind of metrics are needed in order to monitor and verify the development work. There were quite limited metrics and monitoring focused on sales figures and individual customer feedback. We decided that we will start monitoring customer feedback more systematically and we will also start counting the working time of an individual employee that goes into customer complaints.

3.6.3 The third Lean workshop

In the third Lean workshop we reviewed company x's value and waste for the customer. The value is divided into two parts, quality and price in company X. The customer's perceived value is the difference between the benefit they received and the sacrifices made. Customer experience is other hand the difference between perceived/received

and expected quality from company X, but experiential quality is only one dimension of quality.

We did a value stream board for company X Figure 3 which also reflects the company X's flow efficiency. The value stream board described who does what at which stage of the sales and customer process and how long it takes to do the work. On the board we defined the main goal, customer and systems used in the process. After that, the participants could put on the board loss/waste and solution they felt it was important to high-light. We are also looked for Kaizens from the value stream, i.e. points in the process where it would be especially possible to eliminate waste and increase value for the customer.

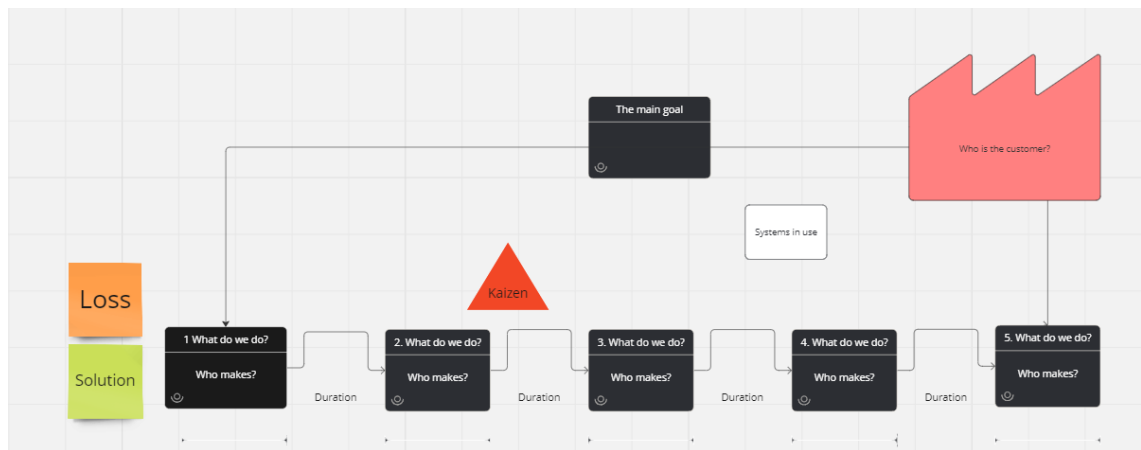


Figure 3. Value stream of the customer and sales process in company X

On the other hand, waste was defined as an activity that does not produce added value from the customer's point of view, is waste. Wasteful activities such as storage, waiting and correcting errors should be reduced, as they use resources unnecessarily and slow down the flow. We collected the points of Kaizen from the value stream board and listed company X's waste in Figure 3. As you can see from the Figure 3, there was waste in sales and customer processes in all forms of Lean waste.

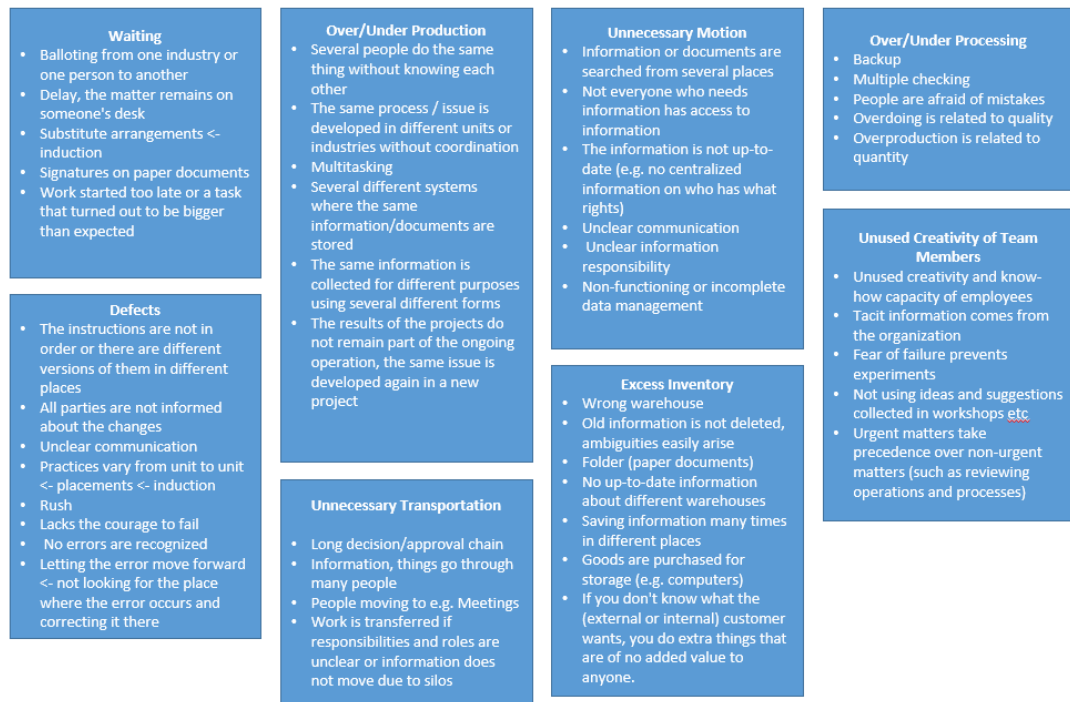


Figure 4. Company X waste board

The waste table helped to find process wastes even better and more clearly. The waste board also opened a discussion among the workshop participants about what and how the process could be developed.

3.7 Action taken

3.7.1 The final workshop

At the final workshop we gathered together all the data from the previous Lean workshops and went through the data in a condensed manner among all participants. Because there was a lot of data and follow-up measures, we used the prioritization matrix and root cause analysis to review the results. Both tools help with prioritization and to prevent problems from recurring.

To compile the results from the workshops we used Lean tool called A3 which is a continuous development tool that is also structured and standardized. A3 is based on PCDA thinking. PCDA means plan-do-check-act. I and my co

facilitator made our own A3 base to company X which we used. However, the A3 base was made exactly according to the instructions of the Lean method. The base included the title, background information about the workshop, goals, current status, analyses, plan, responsible persons and schedule.

A3	4. Description of the target state
1. Problem definition (what is the problem)	<ul style="list-style-type: none"> Clear process Make buying easy for customer Superior customer experience Minimization of billing errors Fluency Automation Clear contracts Internal cooperation
<ul style="list-style-type: none"> Comprehensibility of the sales process internally Roles and areas of responsibility unclear Systems incomplete 	5. Implementation plan (rough level plan)
2. Background and description of the current state	<ul style="list-style-type: none"> Systems and automation Contract process Internal cooperation Billing Transfer of personal data
<ul style="list-style-type: none"> Sales are vital to the company Competitors currently have a better situation 	6. Monitoring (how we measure success)
3. Analysis	Reporting: number of purchased services, customer satisfaction, feedback
Described in the value stream	7. Continuous development (how to standardize the solution as part of continuous operation)
	<ul style="list-style-type: none"> Internal trainings regularly Establishing a working group that meets regularly Reporting to the management team four times a year

Figure 5. A3 Problem-Solving- A Resource Guide

Value stream (Figure 3. Value stream of the customer and sales process in company X) and A3 (Figure 5. A3 Problem-Solving- A Resource Guide) were the process diagram of our development work and with them we showed how the process steps could be handled more efficiently in company X. The participants could implement in their practical work and introduce new methods of operation to their colleagues who were also involved in the process at company X. We distributed these to the management team of company X and after that further development points were introduced to different teams in company X.

4 Results

In this chapter we presents the research results through research questions. The participants' interviews were conducted face-to-face at the premises of company X or via Teams by the researcher and the interview answers are also written down by the researcher. The research data has been processed by the researcher and here the results are presented anonymously. The content analysis helped us to notice that there are significantly more similarities in the research data and the participants' interviews to focus on than there are differences.

How important it is to develop occupational health sales and customer processes

All participants agreed that it is very important to involve employees in the development process of the company. Developing work is part of every employee in the present day (Ojasalo et al. 2014). Employees usually have the best understanding of practical work and how everything affects everything. It was felt that involving the employee helped to focus better on essential matters. It was also felt to be important that the participants were from different parts of

the organization in order to utilize as much knowhow and knowledge as possible.

“So that practical matters must also be taken into account in the development of pro-cesses. It is important to hear how things really work and which areas affect each other. In general, involving different experts in the development work increases understanding and gives an overall picture. It is important to know how your own work affects the overall picture. Where the matter comes to your desk and where it goes from there, and what they affect”

“Employees have a lot of experience specifically in practice, i.e. how current processes work and how they don't work. It is important that sales processes and all other pro-cesses are designed so that the people who use them can influence their development, so that they serve the purpose as well as possible.”

It also emerged that development process were really good place to get to know people who participate in the process in some way. This lowers the threshold to ask for help in the future and makes work easier when you know who to ask for things. Remote working in particular has distanced people from each other.

“So that the overall picture of the combined effects becomes clearer to everyone. In addition, the faces become familiar, and with the workshop, the threshold to contact internally to clarify things is lowered, because you know who to contact. Thanks to this, it will be easier to avoid certain challenges in the future that will ultimately affect the customer experience.”

The participants listed a lot of the same things about what were the most important achievements of the Lean workshop. These things were among others: growing understanding and engaging people in development, people were given the opportunity to influence and participate in improving their own work. Workshop also increases motivation to develop your own work. It was also important to be able to understand one's own part and its possible development, so that things would run better. Together participants felt that collaboration internally and finding the most important development targets were one of the main things of the Lean workshop.

“Internal cooperation, understanding the whole, i.e. how all the functions eventually fit together. Final effect on companies' customer experience.”

“Growing understanding and engaging people in development. People were given the opportunity to influence and participate in improving their own work. It also increases motivation to develop your own work. It was also important to be able to understand one's own part and its possible development, so that things would run better.”

“We found the most important development targets. The fact that we got together to think about things has certainly brought a few new ideas about subcontracting, for ex-ample, on the sales side, and how to talk about them with customers.”

“Process development, ideation together”

The final question was did the participants think that the process develop and how it was reflected in their own work. Many thought that the structures of the organization at the moment seem to be such that there is no capacity to make massive development leaps right now. But they also believe that the threshold to be in contact has been lowered and through editing one's own work, some things have certainly been smoothed out. Also, the general increase in understanding has brought a sense of the whole, so that perhaps at an earlier stage, you can communicate with your colleague and consider the possible effects of the activity.

“The structures of the organization at the moment seem to be such that there is no capacity to make massive development leaps right now. But I would believe that the threshold to be in contact has been lowered and through editing one's own work, some things have certainly been smoothed out. Also, the general increase in understanding has brought a sense of the whole, so that perhaps at an earlier stage, you can communicate with your colleague and consider the possible effects of the activity.”

“Some new operating models have been introduced, and they have brought a little relief to my own work. However, bigger changes are just coming, so at the moment not much can be seen in my own work.”

“I think yes. Collaboration internally in customer care has improved, and I believe it will also be reflected in the customer experience for customers.”

Does Lean work as a development method in the health sector

The lean workshop received a positive reception. It was considered important that the workshop was well planned and the facilitation of the workshop and, of course, the recording of achievements. The Lean method was perceived to help focus on essential matters, and with its help it was also possible to highlight problem areas in various processes.

“Useful, and very opening up the process, when all the points are looked through and the problem areas are clearly seen.”

“Very well. What is important is planning and facilitation and, of course, recording achievements. The assignments were really clear and through them many development targets were achieved in a good spirit. There was also a wide-ranging understanding of what everyone could possibly do better in their own work.”

“I think the Lean method worked well. It helped to focus on essential issues, and it also helped to highlight problem points in various processes.”

4.1 Trustworthiness

This paragraph discusses the reliability of research, qualification and verification of results. The following were chosen as indicators of the success of the development work

- Development of the sales process more productive for company X
- Lean is a working development method for company X

At first I reported to the management on the results of the Lean workshops and I was immediately asked for the next Lean workshop as a whole so it can be stated that the development work was successful. Lean workshops will continue to be seen at company X. Another thing to be defined as a metric was that the sales process would develop so that it would be more productive for the company. Productivity was studied in terms of where the employee's time is

spent. We measured this by the number of customer complaints before and after the Lean workshops.

Qualitative research methods semi-structured interviews were used in the action re-search, so the reliability of the research and validity are challenging to determine and the terms are strongly linked to the quantitative research method (Hirsjärvi, Remes and Sajavaara, 1997:217). Qualitative research still has to be evaluated somehow. I have tried to accurately describe and document the stages of the entire development work so that the research would be reliable and valid.

Below is a description of the main steps of the development work and the development schedule.

Table 1. Development schedule

Timetable
Autumn 2021 Defining the researched phenomenon and the goal of the development work
Spring 2023 Lean workshops
Autumn 2023 Interviews
Spring 2024 Presentation of results and follow-up activities

4.2 Ethical concerns

Since this thesis is based on working life, in addition to the ethical rules of science, the ethical rules of the business world are also related to it. The development work must be of high quality and such that the results can possibly be used in practical work. In my mind, the biggest ethical question in this thesis is related to the interaction between people. It is also important to make sure that the participants know what is being studied. (Ojasalo et al. 2014:48-49)

In accordance with good research ethics and GDPR (General Data Protection Legislation), everyone who participated in the workshop received information sheet about what kind of research they are participating in and its conditions (Appendix 2). After the participants had had time to familiarize themselves with the information sheet, a voluntary written research permit was collected from each of them by which they agreed to participate in the study (Appendix 3). The processing of research results and personal data was also precisely agreed with Metropolia University of Applied Sciences, company X and the participants, how, where and who stores information. The researcher is responsible for keeping the interview data secure and deleting the data within a certain period of time after the study. The anonymity of the participants was taken care of in the study.

The lean method is also new in company X. The company X is also not committed to the Lean management philosophy, but is only being utilized in individual workshops. Knowledge regarding Lean is therefore the responsibility of individual employees,

In such a thesis, which is made for an organization, there is a risk that the participants feel obliged to participate in the research. All participants are employees of one company. Forcing is not a good thing, especially when the participants are expected to be honest. Some of the data is also confidential from a business point of view and since not all the data could be imported into the thesis, this also affects the reliability of the thesis.

The company's customer was not included in the development work so part of the sales process was missing. On the other hand, one of the measures of the study was related to the study of the company's productivity, which was studied on the basis of customer complaints.

In qualitative study there are always possibility that the researcher's awareness and opinion may affect the research. However, I try to limit this by trying to be aware of my pre-understanding of the subject. I tried to listen and record as well

as possible the experience of all participants from the workshop and based on that, compile and present the results with as open a mind as possible.

There are only used Finnish and English materials in this thesis study. Because of this, some good studies may have been left out of the thesis. On the other hand, since the topic is specific occupational health care, it is possible that no books and studies could have been found.

4.3 Utilization of results/suggestion for future development

The sales figures of company X were one of our metrics mostly due to the wish of company x's management. New customer acquisition and how many customers we lost were the sales figures we observed. These numbers did not change much during the monitored period. Putting the results of development work into practice often takes some time, and this is probably precisely because new operating models have not yet been implemented everywhere. We already prepared for this at the beginning, which is why other metrics were also taken into the development work.

Another perhaps better measure of development work was the reduction of customer complaints. I have asked participants to collect customer complaints quantities before the workshops. These emerged most clearly in the work of the invoicing department, where almost every invoice was complained about before the workshops. After the workshop customer complaints clearly decreased and in some cases they stopped al-together. It was also felt that sales had sold things that had not been able to be offered to the customer. However, the workshop helped improve internal cooperation (regular meetings, understanding of others' job descriptions), which was also felt to have improved sales' understanding of the services being sold to the customers.

The company's customer satisfaction survey was found to be somewhat incomplete and it was hoped that it could be developed to be more informative in the future. It was not taken as a measure because it could not be

distinguished from what exactly the customer had given points, i.e. what customer satisfaction consisted of.

The other measurement was use of participants' working time. This was related to the customer complaint meter. In other words, it was measured whether the development of the sales process in the workshop helped to save the employee's working time. Measuring this is also at the same time measuring cost efficiency for the company. We mainly calculated how much working time the reduction in customer complaints freed up employees' time for other work. The result we got was that the reduction in complaints freed up the work time especially of the Lean workshop participants who were part of the company X invoicing team by 1-2 hours a week.

Because the second research question concerned the operation of the Lean method in the development of the sales and customer processes of a private health care service provider, we also wanted to give it its own metrics. The success of the Lean workshops was studied by the commitment of the participants. All employees participated in the lean workshops voluntarily in addition to their own work. According to this metric, the Lean workshops were perceived as useful, the participation rate was at least 88%, and in most of the workshops 100% of the participants were present. Feedback that came up in a few workshops was that the workshops could have been a little shorter and more frequent, it would not have been necessary to repeat in such depth and there would have been more time for new ideas.

During the workshops it was noticed that one aspect of the sales and customer process had been completely forgotten and there was no information about that part of the process. Luckily, this was already noticed in the second lean workshop and the representative of the process had time to tell about her own job description and its effect on the course of the process. Unfortunately, he didn't have time to participate in the workshops because they weren't scheduled in time.

Otherwise, more participation from nursing staff, nurses and doctors was hoped for. The problem with including them is that they do billable work, so the decision should come from the management level, so that the development work compensates the costs of the work not done. This is also related to the strengthening of the management's commitment to the development work carried out in company X.

It was also felt that more would have been gained by involving the customer in the development process. By interviewing from the customer's point of view whether the workshop had an impact on the sales and customer process and what possible wishes they would still come up with. Now the customer's voice came up only in customer feedback.

The last measure used to study the functionality of the Lean workshop concerned the utilization of the results of the workshops in company X in practical work. The company X has used the results of the workshop in practical work, so it can be said that the development work was successful. Company X's management team was also so satisfied with the Lean workshops that they requested the same for the development of another process. The development of sales and the customer process is such a big process in the organization that not everything was completed, but the development work had to continue in company X, which also required the management's commitment to the development work.

4.4 Conclusions

Overall the development work for company X was a success. Development work aims to improve a product, process or method (Ojasalo et al. 2014). Company X's development work succeeded in improving the company's sales and customer processes. The action research, i.e. the Lean workshops, were also successful and the participants found them useful.

At the beginning of the Lean workshops, we stated that company X's reporting is largely based on sales figures. However, in our workshop participant's

opinion, the sales figures did not tell the whole truth so we also wanted to include other measures for the success of the process. We set our own metrics for both research questions. The meters were monitored for a fairly short time from around spring 2023 to the end of 2023. In addition to sales figures, we followed the development of the process by the number of customer complaints and the freeing up of an individual employee's working time for other work. The success of Lea's workshops was measured employee engagement and participation in Lean workshops and utilization of the results of the Lean workshops in company X.

The measures of the development work were defined as

- Sales figures
- The reduction of customer complaints
- Use of individual employees' working time
- Employee engagement and participation in Lean workshops
- Utilization of the results of the Lean workshops in company X

The workshops received a lot of praise from the participants and were quoted all the way up the management ladder. It was important that the development work was well documented and the metrics set for it. With the help of metrics, it was possible to demonstrate the profitability of the development work for company X and to commit the management of company X to follow-up measures.

However, I think the biggest sign of the success of the development work was the fact that I was already asked for the next set of Lean workshops regarding company X current customers and related processes.

4.4.1 Follow-up actions

Usually, the development work does not end with getting an answer to the research problem. You have to decide to stop the study yourself after the results have been re-ported and you are at the conclusion that your study is finished. However, the end of the study may be the beginning of another study and usually at least the study is followed by follow-up actions. (Alasuutari, 1994)

Development work and Lean workshops raised several different follow-up actions for company X. One of the most important was regular reporting to management and commitment of management to development work. This is important so that the development work and doing it is also part of company X's business strategy and that the development work goes in the company's desired direction. This was supplemented by the improvement of the reporting tools and the clarification of what the management wants to be reported.

Other follow-up actions were the distribution of information to the various units of company X, increasing training and internal cooperation. For this, it is important to name responsible persons and schedule schools and meetings in people's calendars.

4.4.2 Self-assessment

The Lean workshops and whole development work were successful and useful. The sales process of company X could be improved through development work and the Lean method was so effective that company X want to use it in the future as well. In addition, I feel that the planning and implementation of Lea's workshop was a useful learning experience for my own career. The biggest benefits of the development work have been the improvement of company X's sales figures, the reduction of complaints and the freeing up of employees' working time for other tasks.

Although the planning and implementation of Lean workshops were done during working hours, I found them a bit challenging in addition to my own work. The

development work would require its own time and the fact that it could be done in peace. However, I am satisfied that the topic of sales and processes interests me a lot and I was able to implement Lean workshops on them. Complaints decreased considerably after Lea's workshops, which brought profitability to the company.

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Appendices

BODY OF THE SEMI-STRUCTURED INTERVIEW

A report of the functionality of Lean workshops in customer and sales processes. The researcher interviews.

Interviews at company X premises, Teams or over the phone.

The researcher writes down the answers.

Interview questions

- 1 Why is it important for the organization to involve employees in the development of the company's customer and sales process?
- 2 How did you feel Lean method in the 2023 workshops?
- 3 What do you think was the most important achievement of the workshops?
- 4 Have the process improved after the workshops and how does it show in your own work?

PARTICIPANT INFORMATION SHEET



Participant Information Sheet

PARTICIPANT INFORMATION SHEET

This Participant Information Sheet Template includes essential information that you are obliged to provide to research participants. This template is a guide to help researchers design study information sheets. You can alter the text as relevant for your study, but headings should remain (if not mentioned otherwise).

Study title: Developing sales and customer process with Lean to improve the company's productivity

Invitation to participate in a research study

For example: We'd like to invite You to take part in our research study, where the purpose is to study whether the Lean development method works in the development of occupational health sales and customer processes in [REDACTED]. Moreover to examine why it is important to develop these processes from the productivity perspective. The aim is to bring out information that [REDACTED] and it employees can apply to its practical work in the future.

This information sheet describes the study and Your role in it. Before you decide, it is important that You understand why the research is being done and what it would involve for You. Please take time to read this information, and discuss it with others if You wish. If there is anything that is not clear, or if You would like more information, please ask us. After that we will ask You to sign a consent form to participate in the study.

Voluntary nature of participation

The participation in this study is entirely voluntary. You can withdraw from the study at any time without giving any reason and without there being any negative consequences. If You withdraw from the study or withdraw Your consent, any data collected from You before the withdrawal can be included as part of the research data.

Purpose of the study

The purpose is to study whether the Lean development method works in the development of occupational health sales and customer processes in [REDACTED] and why it is important to develop these processes from the productivity perspective. Participants are interviewed during the study.

Who is organising and funding the research?

[REDACTED] provides an employee resource for the study. [REDACTED] and Metropolia provide material and tools for researchers to carry out development work.

What will the participation involve?

Important information for participants:

- The study includes four Lean workshops (kept within 2-3 months in 2023), 2 hours are always reserved for one workshop, the workshops are held in the premises of the [REDACTED]
- Each participant will be interviewed after the workshops (1h), interviews are held in the premises of [REDACTED] or in Teams



Participant Information Sheet

- The workshops have a facilitator who gathers information about the sales and customer process of [REDACTED]; the Lean method. The participants together with the facilitator try to find development targets in the process.
- Participants are interviewed using a semi-structured interview

Possible benefits of taking part

The aim is to bring out information that [REDACTED] and its employees can apply to its practical work in the future. At best, the participants can improve their own work and the way it is done.

Possible disadvantages and risks of taking part

Working time from participating in the research is away from normal work.

Financial information

Participation in this study will involve no cost to You. You will receive no payment for Your participation.

[REDACTED] is funding the research.

Informing about the research results

The results are documented in a common workspace for everyone. Petra Vienonen's Master's Degree Programme in Health Business Management thesis will also be available to everyone.

Termination of the study

The researcher(s) conducting the study can also terminate the study if there are no participants in the study.

Further information

Further information related to the study can be requested from the researcher / person in charge of the study.

Contact details of the researchers

Researcher / Student
Name: Petra Vienonen

[REDACTED]

Person in charge of the study / Supervisor

[REDACTED]

Within this study, Your personal data will be processed according to the European Union General Data Protection Regulation (679/2016) and current national regulation. The processing of personal data will be described in the following items.

Data controller of the study

Data controller is the natural or legal person, public authority, agency or other body which, alone or jointly with others, determines the purposes and means of the processing of personal data.

Contact person for matters related to the processing of personal data

Petra Vienonen, [REDACTED]

Types of personal data that will be collected

Name and an email address that contains a real name

There is no statutory or contractual requirement to provide Your personal data, participation is entirely voluntary.

Personal data protection principles

E-mail, Teams, Onedrive:

The data that is to be processed in the information systems has been protected using the following:

- user ID password user registration access control (physical location)
 other methods, please specify:

For what purpose will personal data be processed?

In order to get as much information as possible about the research from the people participating in the different work phases process.

Legal basis of processing personal data

A consent granted by the data subject

If the legal basis is a consent granted by the data subject, You have the right to withdraw the consent at any time as described in this Privacy Notice.

Nature and duration of the research (how long will the personal data be processed):

- One-time research Follow-up research

Duration of the research:

2023-2024= time frame needed for collecting and analyzing the data and for the publication of the study (plus three years for possible reclamations about the research results and time needed to respond to them) .

What happens to the personal data after the research has ended?

How the personal data will be processed after the research has ended:

- Any research materials containing personal data will be destroyed
 Any research materials containing personal data will be archived
 without identifiers

with identifiers

Where the materials will be archived and for how long:

Data transfer outside of research registry:

Personal data will not be transferred outside the research group.

Possible transfer of personal data outside the EU or the EEA:

Your data will not be transferred outside of the EU or the EEA.

Your rights as a data subject

Because Your personal data will be used in this study, You will be registered to study registry. Your rights as a data subject are the following

- Right to obtain information on the processing of personal data
- Right of access
- Right to rectification
- Right to erasure (right to be forgotten)
- Right to withdraw the consent regarding processing of personal data
- Right to restriction of processing
- Notification obligation regarding rectification or erasure of personal data or restriction of processing
- Right to data portability
- The data subject can allow automated decision-making (including profiling) with his or her specific consent
- Right to notify the Data Protection Ombudsman if you suspect that an organization or individual is processing personal data in violation of data protection regulations.

If the purposes for which a controller processes personal data do not or do no longer require the identification of a data subject by the controller, the controller shall not be obliged to maintain, acquire or process additional information in order to identify the data subject for the sole purpose of complying with this Regulation. If the controller cannot identify the data subject the rights of access, rectification, erasure, notification obligation and data portability shall not apply except if the data subject provides additional information enabling his or her identification.

You can exercise your rights by contacting the data controller of the study.

Personal data collected in this study will not be used for automated decision-making

In scientific research, the processing of personal data is never used in any decisions concerning the participants of the research.

Pseudonymisation and anonymisation

All information collected from you will be handled confidentially and according to the legislation. Only the researcher has access to files that contain personal data. The files are protected with a username and password. Researcher can provide the participant with own research data upon request with an encrypted email. The final research results will be reported in aggregate form and



Participant Information Sheet

it will be impossible to identify individual participants. Research registry will be stored in personal files for 3 years after the study, after which it will be destroyed/deleted.

Researcher has to inform the participant if the collected data will be used for later research (for example "The data collected from You can be later used in theses. The participant has the right to request information of people who have received data for their use"). If the legal basis for processing personal data has been consent and you wish to use the data in further studies, a specific consent for that has to be received.

Please mention if you intend to cooperate internationally and clarify the confidentiality and protection of the data as well as possible agreements on data processing.

PARTICIPANT CONSENT FORM



Participant Consent Form

PARTICIPANT CONSENT FORM

Title of the study: Developing sales and customer pro-cess with Lean to improve the compa-ny's productivity
Location of the study: Metropolia University of Applied Sciences, Master's Degree Programme in Health Business Management, Petra Vienonen, [REDACTED]
 [REDACTED]
 [REDACTED]

I [name of the participant] have been invited to participate in the above research study. The purpose of the research is to study whether the Lean development method works in the development of occupational health sales and customer processes in [REDACTED], this thesis examines why it is important to develop these processes from the productivity perspective. The aim is to bring out information that [REDACTED] and it employees can apply to its practical work in the future.

I have read and understood the written participant information sheet. The information sheet has provided me sufficient information about above study, the purpose and execution of the study, about my rights as well as about the benefits and risks involved in it. I have had the opportunity to ask questions about the study and have had these answered satisfactorily.

I have had sufficient information of the collection, processing and transfer/disclosure of my personal data during the study and the Privacy Notice has been available.

I have not been pressurized or persuaded into participation.

I have had enough time to consider my participation in the study.

I understand that my participation is entirely voluntary and that I am free to withdraw my consent at any time, without giving any reason. I am aware that if I withdraw from the study or withdraw my consent, any data collected from me before my withdrawal can be included as part of the research data.

By signing this form I confirm that I voluntarily consent to participate in this study.

If the legal basis of processing personal data within this study is a consent granted by the data subject, by signing I grant the consent for process my personal data. I have right to withdraw the consent regarding processing of personal data as described in the Privacy Notice.

Date

 Signature of Participant

The original consent signed by the participant and a copy of the participant information sheet will be kept in the records of the researcher. Participant information sheet, privacy notice and a copy of the signed consent will be given to the participant.