DOI: https://doi.org/10.30525/2256-0742/2025-11-1-155-167

# IMPLEMENTATION OF AN UPDATED CRM SYSTEM IN THE ACTIVITIES OF A CONSTRUCTION ORGANISATION

# Tetyana Oklander<sup>1</sup>, Mykhailo Oklander<sup>2</sup>, Oleh Shcherbyna<sup>3</sup>

Abstract. In the current unstable political and economic conditions in Ukraine, many construction organisations are experiencing a degree of inconsistency between internal departments, which creates communication difficulties. External communication with clients and business partners is also crucial for the effectiveness of the company. A CRM programme can improve the efficiency of these interactions, meeting the needs of both customers and employees and accelerating the achievement of strategic business goals. The aim of this work is to improve modern methods of implementing CRM systems, to determine their essence and to define their role in the operation of construction and production companies. The use of a modern digital system makes it possible to improve internal and external communication between the company's departments, improve co-operation with partners and potential customers, improve operational records, provide detailed customer analysis, promote strategic planning based on historical activity data, and much more. Together, these improvements strengthen the company's competitive position in the modern Ukrainian construction market. Methodology. This research focused on the development of a strategic action plan to improve the activities of a construction and manufacturing company during its transition to BAS. The main objective of this programme is to automate processes related to interactions with customers at different levels and orientations, and to improve internal communication between departments. The results of the research enabled the creation of a detailed strategic plan for the company's transition to an updated digital programme. Following a thorough preliminary analysis of economic viability, a systematic and staged transition to BAS was meticulously orchestrated. This transition encompasses analytical, accounting, and tax records, while concurrently enabling the parallel operation of the existing software. Significant emphasis was placed on enhancing synchronization and optimising the efficiency of the sales department's operations. Practical implications. The updated digital program's augmented capabilities facilitated the development and implementation of pivotal tasks for transitioning activities to BAS across various company departments. This ensured the streamlining of all business processes and enhanced the organisational structure of the construction enterprise. Particular emphasis was placed on configuring synchronization and improving the effectiveness of the sales department. Value/ Originality. The use of modern management methods, including digital programmes with advanced technological capabilities, together with adjustments to the company's market policy, effective use of marketing tools and optimisation of all internal business processes, will improve partnerships and bring the company's operations to a fundamentally new level. The proposed changes to the internal business processes of the commercial department will enable sales automation, reduce time, improve the quality of customer service and increase the productivity of internal managers.

Keywords: enterprise, CRM system, structure, business process, digital technologies, strategy.

JEL Classification: L1, L3, M2

E-mail: oklander@ogasa.org.ua



This is an Open Access article, distributed under the terms of the Creative Commons Attribution CC BY 4.0

<sup>&</sup>lt;sup>1</sup> Odesa State Academy of Civil Engineering and Architecture, Ukraine

ORCID: https://orcid.org/0000-0003-3955-9808

Web of Science ResearcherID: LCQ-2447-2024 <sup>2</sup> Odesa National Polytechnic University, Ukraine

E-mail: imt@te.net.ua

ORCID: https://orcid.org/0000-0002-1268-6009

Web of Science ResearcherID: M-6970-2019

<sup>&</sup>lt;sup>3</sup> Odesa State Academy of Civil Engineering and Architecture, Ukraine (corresponding author)

E-mail: olegito4ka@ukr.net

ORCID: https://orcid.org/0000-0001-8180-4665

Web of Science ResearcherID: LZH-5631-2025

## 1. Introduction

The state of the construction industry in recent years requires quick and timely managerial decisions to maintain and improve the economic and political position of companies in the modern market. This requires full or partial reorganisation of the company's departmental operations in response to changes in the environment economy, improvement of team performance, detailed refinement of all business processes and operations, monitoring and timely adoption of innovative practices, development of an effective motivation system, adaptation of strategies, tracking and improvement of overall company performance indicators, and more (Shcherbyna, 2013). The advent of contemporary CRM technologies has enabled the resolution of these issues and the modernisation of the operations of construction enterprises in general. The proper configuration of digital programs facilitates the establishment of excellent internal communication between individual company departments, improves operational records, ensures continuous inventory movement control, manages and expands the client base, and much more. Consequently, this significantly enhances the company's market competitiveness.

However, it is important to understand that the introduction of a CRM system, or the modernisation of an existing one, is not a universally applicable solution for improving economic performance. The enhancement of operational efficiency and the achievement of ultimate success are largely dependent on the formulation and implementation of tasks aimed at automating core business processes. These processes may be distorted by the organisation's employees due to conflicts of interest. Therefore, the key to success lies in perfect internal communication and the reduction of employee dependencies in specific workflows.

In contemporary conditions, particular emphasis should be placed on the utilisation of a CRM system as a tool for comprehensive analysis and configuration of the operations of the commercial department in a construction and production enterprise. The implementation of the sales plan is instrumental in determining the effectiveness and coordination of the company's strategy and operations in general. The chosen digital programme concept, supported by a wide range of software tools, allows for automation of all sales-related business processes in unstable economic conditions (Shportko & Vishnevskaya, 2021). Today, many construction organisations face a lack of coordination between departments such as sales and marketing, leading to difficulties in communication and identification of potential customers. A CRM programme improves this interaction and helps to better meet customer needs.

In essence, the modernisation and enhancement of business operations within the context of existing wartime conditions, through the implementation of pertinent digital programs, constitutes a best practice from the perspective of client-oriented business management in the construction and production sector. This approach provides the requisite informational foundation for subsequent strategic development.

## 2. Economic Crisis Effects on Consumer Behaviour

The primary rationale behind the pervasive adoption of digital systems by entrepreneurs can be attributed to the substantial growth of the market, which encompasses a series of pivotal transformations that have fuelled the escalating interest in this strategy (Nikolaenko & Navrotskiy, 2023). The intensification of competition has precipitated a steady erosion of the existing client base, thereby necessitating the implementation of cutting-edge digital solutions.

Yanchuk T. V. and Boienko O. Yu. (2023) in their work noted that with each year of development of market relations, the client becomes more demanding, and companies, in turn, try to implement various strategies aimed at improving the speed and quality of service. According to them, a relevant issue for the development of business activities is customeroriented marketing using modern digital technologies, which allow companies to understand customers and, as a result, to manage them. To achieve this, it is necessary to study and implement a CRM system in line with the company's strategic development plan, which will ultimately enable good relationships to be built with consumers. Using the full potential of the CRM system will significantly increase customer loyalty and sales.

Matros O. M. and Melnyk L. Yu. argue that creating a close link between the CRM system and social media will inevitably increase business efficiency (Matros, Melnyk & Mykhailovyna, 2022). Based on research into the functional characteristics of CRM systems, they identified two key components that determine the success of the relationship between social media and digital systems:

- The social competence skills of company employees.
- The share of company sales from social networks.

Yurchuk N. P. describes the importance of the impact of CRM systems on the management of customer relations. According to his research, the use of digital technologies improves the interaction between managers and clients, helps to identify the most profitable groups of clients and, as a result, increases the level of sales, controls employees and increases their efficiency, creates the ability to respond quickly to changing market needs, automates business processes

Baltic Journal of Economic Studies

and improves the overall performance of the company (Yurchuk, 2019).

Butenko N. V. (2011) identifies the primary elements influencing the effectiveness of CRM technologies:

Understanding customer relationships.

- Organisational structure changes.

- Modernisation of the company's business processes.

- Changing internal corporate communication and culture.

- Implementation of a CRM system.

Notwithstanding the substantial corpus of scientific studies on this issue, a number of questions remain unresolved. Primarily, there is a paucity of a unified strategic approach to the mechanism of digital management in company operations, understanding client relationships, and planning a competitive policy in the modern construction market.

# 3. Survey Methodology

The enhancement of competitive positions in the market is contingent upon the elevation of customer satisfaction. A meticulous strategic development plan must be predicated on a comprehensive analysis of customer purchasing behaviour, needs and daily activities. The implementation of contemporary management methodologies, incorporating digital programs with advanced technological capabilities, along with modifications to the market policy framework of the company's activities, the effective utilisation of marketing instruments, and the optimisation of all internal business processes, is expected to enhance partnership relationships and elevate the company's operations to a fundamentally new level (Hordiienko, 2021; Mozgova, Morozov & Fomin, 2017).

The aim of this work is to use modern methods of implementing a CRM system, to define its essence and to assess its role in the operation of a construction and manufacturing company.

Within the framework of this research, the focus was on the creation of a strategic action plan to improve the activities of a construction and manufacturing company during the transition to BAS. The main task of this programme is the automation of customer interaction processes at different levels and orientations, as well as the improvement of internal communication between different departments (Trainor, Andzulis & Rapp, 2014). BAS allows to increase the efficiency and coordination of the work of production, commercial and technological departments, marketing, procurement, etc. The transition scheme of a construction and manufacturing company to BAS is shown in Figure 1.

In the process of devising a comprehensive strategic plan for the transition of the company to a contemporary digital program, the preliminary analysis of economic viability assumes primacy (Marusey, 2016; Shen, Normann & Alsalous, 2024). This facilitates the mitigation of all potential risks, the calculation of prospective profitability indicators, and the assurance of the efficacy of the hypothesis pertaining to the enhancement of the company's operational performance.

The successful utilisation of the programme is contingent upon the establishment of an effective information space, accompanied by the requisite modifications to the company's operational structure (Mozgova, Morozov & Fomin, 2017). This approach is motivated by the necessity for automated solutions to commonplace tasks and the comprehensive enhancement of customer relations. The proposed model integrates all data, synchronises time and parameters, and leverages the full capabilities of the digital program BAS (Figure 2).

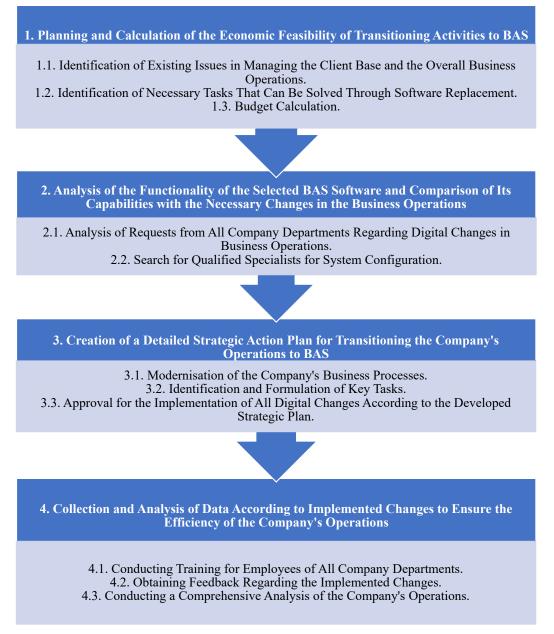
# 4. Findings

The subject of the research in this work is the activity of a representative of the construction business in Ukraine (the company LLC "Baugrand"), a manufacturer and supplier of special building materials and technical solutions for new construction, installation and repair of industrial floors, decorative coatings, thermal and sound insulation systems, and more. The company's extensive experience and unique operational specifics, which include comprehensive client support with design and technical supervision services, the development of system materials, and a complete range of equipment for carrying out work, necessitate the enhancement and digitalisation of all business processes and operations, monitoring, and the timely implementation of innovative business practices, etc.

It should be noted that in order to create a comprehensive strategic transition plan for the company's operations to the updated digital programme, it is important to identify the list of implemented functionalities based on the analysis of internal requirements, the overall market situation and the capabilities of the software, as shown in Figure 3. The review of the functionality is necessary to identify planned structural changes and to define precise tasks for the persons in charge of the company's departments.

The list of key programmes shown in Figure 3 was accepted for preliminary consideration. The start of the gradual transition of the Company's operations to the updated digital BAS programme was planned for January 1, 2023. The head office of the company is located in Odesa.

Before implementing the planned changes, special attention must be paid to analysing the existing organisational structure of the company. Not only is a well-developed business model important, but so



**Figure 1. Diagram of company's transition to BAS** *Source: developed by the authors* 

is effective internal communication. In this regard, it is necessary to carefully process all initial requests, direct efforts towards training and obtain feedback from the company's employees. The maximum benefit from digital modernisation of the company's operations can only be achieved if the corporate culture is maintained and the necessary changes are made with prior discussion and coordination with the staff (Yaroshenko, Geseleva & Podolna, 2015). This will reduce the likelihood of passive resistance to the use of the platform and potential sabotage in its implementation. The organisational structure of the construction and manufacturing company is shown in Figure 4. As a result of working through the required functionality and gaining an understanding of the future strategic direction of the organisation, taking into account the characteristics of its unique structure, the key tasks for the company's internal departments were formulated to ensure an effective transition of activities to the updated digital programme. First and foremost, it was of interest to identify the planned changes in the digital activities of the finance department, as proper financial accounting is key to the success of any business (Table 1). A comprehensive gradual transition was planned for the management of analytical, accounting and tax records, with the possibility of working in parallel with the existing software.



Figure 2. BAS application possibilities

Source: developed by the authors

The management of production activities requires a unique approach and presents some challenges due to the extended structure of the organisation. presence of a production department, The a technological laboratory for research into the structural properties of existing materials and the development of fundamentally new materials, several warehouses for raw materials, finished products, auxiliary materials and various equipment requires special attention to the optimisation of business processes (Table 2). The coordinated work of all the company's employees in fulfilling the set tasks will be the key to achieving a positive final result.

The allocation of material and technical resources is a labour-intensive process; nevertheless, neglecting this aspect of production activity can often result in significant financial losses for the enterprise. The supply department of the studied organisation comprises a manager for foreign economic activity and a supply and logistics manager. The main tasks for optimising the business processes of this department, shown in Figure 3, are primarily aimed at improving the economic performance of the production of the company's own products. The transition to the updated programme, with corresponding changes in the operations of the Supply Department, will improve control over delivery times, improve partnerships with suppliers, ensure compliance with international agreements, streamline internal communication with other departments, and more.

The company's human resources policy, both in terms of managing the professional and psychological potential of existing employees and in terms of attracting new, promising young specialists, requires particularly focused work. The implementation of internal training programmes and courses to improve

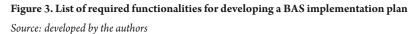
Table 1

Key tasks for setting up business processes and procedures in BAS for the finance department

<u> </u>					
No.	Task and description	Comments	Responsible person		
		Complete the transition of the company's activities to BAS.			
1	Implementation of accounting in BAS.	Conduct a parallel transition and accounting in BAS of all	Financial Director		
		responsible persons (fixed assets).			
1	Preparation of the management balance	Create a management balance with the interconnection between	Financial Director		
	sheet.	"Balance-Sheet-Report" and "Financial Results - Cash Flow".	Financial Director		
3	Maintenance of analytical, accounting	Implement comprehensive structural accounting for the company.	Financial Director		
3	and tax accounting of the company.	implement comprehensive structural accounting for the company.			
4	Translation of accounting into Ukrainian.	Keep accounting records exclusively in Ukrainian. If possible,	Financial Director		
4		supplement the raw materials database with English.	Financial Director		
	Supervising the creation of all business	Overseeing the transition of operations to BAS and the			
5		implementation of procedures for creating all requests by	Financial Director		
	processes by the company's departments.	departments.			

*Source: developed by the authors* 

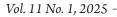
	to 31.12	entation period: from 01.01.2023 .2023 n: Odesa
Program list for C	CRM	Brief description
Daily tasks		Distribution of tasks from the manager or administrator, general planning of personal work, keeping minutes of meetings and other activities.
General reports		Work planning for the period, a report on the work done, feedback on reports.
Financial reports		Receivables, cash flows, payments and other related matters.
Logistics		Transportation request, feedback.
Production		Production request, feedback.
Calendar		Calendar with notifications of upcoming events.
Email		Email access from BAS, synchronisation.
Clients		Client database of the manager with a filter.
BAS tracker		Data updates.
Invoices		Creating invoice and commercial proposals.
Price and access		The company's price list with base prices, pricing system, and more.
Technological		Possibility of automatic recalculation of changes in formulations.
HR Department		All templates, onboarding for new employees.
General statistics		Reports for management.
Company Disk		A data storage disc (for example, a company server).
Calls		Incoming calls to the manager's corporate phone number.

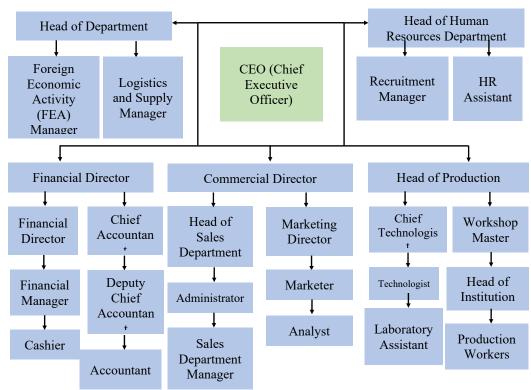


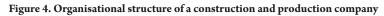
the skills of employees, the effective recruitment of new candidates and the creation of efficient adaptation programmes will bring the company's human resources potential to a fundamentally new level. In the context of this research, the primary tasks for optimising business processes and procedures in the BAS personnel department were formulated, as illustrated in Table 4. The recruitment of new employees should be conducted in accordance with the planned strategic changes, which will be reflected in the implemented programme. It is imperative to emphasise that the integration of highly qualified workers and new technologies will facilitate a substantial advancement in the development of the entire organisation.

Finally, an analysis is to be conducted of the operation of one of the most significant company departments, that is, the commercial department, the function of which is to generate profit. The principal tasks for optimising the business processes of the sales department manager and the marketing director are presented in Table 5.

During the company's transition to BAS, great emphasis was placed on configuring the synchronisation







Source: developed by the authors

#### Table 2

# Main tasks for establishing business processes and procedures in BAS for the production department

No.	Task and description	Comments	Responsible person
1	Creation of stocks of finished goods and raw materials.	equipment Land one for raw materials Linchiding semi-finished	
2	Recording of wet raw materials and processed (dry) materials.	Responsible for the production of raw materials in one shift (e.g., dry sand, basalt, etc.).	Production Manager
3	Generation of a report on actual production output.	The report must clearly show the raw materials used (e.g., drying sand, basalt, etc.). The report shall be prepared by the Shop Manager.	Production Manager
4	Validating fixed technological standards.	Approve fixed technological standards with the signatures of the Director and Chief Technologist.	Chief Technologist
5	Creation of a raw material reference book.	Continuously maintain the raw material reference guide.	Chief Technologist
6	Formalisation of the procedure for creating purchase orders.	Improve the procurement business process for raw materials.	Production Manager
7	Creation of two reference books for raw materials: management and accounting.	Create reference guides for raw materials (nomenclature) with different supplier codes.	Production Manager
8	Create a technical specification for production.	Production is carried out in accordance with technological standards, based on a production request from the Sales Manager.	Production Manager
9	Writing-off inventory for a specific production batch.	Keep a separate write-off document for each specific production batch.	Production Manager
10	Create a report comparing approved expenses and actual write-offs.	The report should include a breakdown by batch and period.	Chief Technologist
11	Generation of a report comparing the actual results with the standard output of dry semi-finished products.	Maintain strict control over standards for dry semi-finished product output.	Chief Technologist
12	Improving the gas write-off mechanism.	Develop an automated mechanism for writing-off gas against the cost of processing raw materials.	Production Manager

Source: developed by the authors

#### Table 3

Main tasks for establishin	g business	processes and	procedures in <b>B</b>	<b>SAS for the Su</b>	pply Department
----------------------------	------------	---------------	------------------------	-----------------------	-----------------

No.	Task	Comments	Responsible person
1	Work with material purchase requests.	Ensure the fulfillment of international agreements.	Foreign Economic Activity Manager
2	Work with transport requests.	All logistics costs for material supply should be reflected in the transport requests.	Foreign Economic Activity Manager
3	Transport search.	Maintain constant communication with the logistics department.	Foreign Economic Activity Manager
4	Optimisation of delivery costs. Quality and quantity control of goods during shipment and receipt for compliance with standards.	Regardless of which warehouse the goods arrive at, the Foreign Economic Activity Manager is responsible for organising the acceptance of products and submitting documents to the Accounting Department.	Foreign Economic Activity Manager
5	Control of transport requests in BAS (status change in progress).	When the request is completed, change the status (shipped). If the delivery schedule changes, provide feedback to the responsible manager with a note in BAS.	Logistics Manager
6	Searching for carriers, working with drivers, issuing passes for vehicles if there is a request in the BAS.	Ensure logistics for all warehouses.	Logistics Manager
7	Creation and transfer of outbound and inbound documents based on a shipment request for all warehouses.	Use the capabilities of company representatives (managers, employees of logistics structures) at regional warehouses.	Logistics Manager
8	Maximum control over cargo operations at the warehouse in Odesa.	Coordinate and establish operations with partner transport companies.	Logistics Manager

*Source: developed by the authors* 

Table 4

# Main tasks for establishing business processes and procedures in BAS for the HR Department

No.	Task	Comments	Responsible Person
1	Staff adaptation.	Create onboarding programmes for new employees.	Head of the HR Department
2	Templates creation.	Collect employee information in BAS to improve internal communication.	Head of the HR Department
3	Professional development.	Develop internal training programs.	Head of the HR Department

(Source: developed by the authors)

and improving the efficiency of the sales department. The sales department can be considered one of the most important structural elements of any organisation, as it ensures the company's sales and, consequently, its profit. Therefore, the main opportunities for automating sales and marketing can be classified as follows:

- Optimisation of the manager's work planning, which allows for more efficient use of working time and control over the daily tasks of the commercial department employees;

- consistency in customer relations, which ensures that no client is lost when a manager changes;

- ability to analyse and improve the effectiveness of commercial proposals;

ability to identify the most effective sales channels;

maintaining and expanding the customer base;

 improving internal communication between the sales department and other departments, ensuring the correctness of many business processes;

increasing sales margins;

cost optimisation;

– etc.

In general, information systems allow to significantly simplify the work of the sales department of any organisation in terms of rational use of human resources, optimisation and control of the implementation of the sales strategy (Ganushchak-Yefimenko, 2017). The proposed changes in the internal business processes of the Commercial Department will automate sales, reduce time, improve the quality of customer service, and increase the productivity of the company's managers.

It is important to acknowledge that, within the context of this scientific research, the operational principles for each responsible individual are concisely delineated. It is evident that the comprehensive list of responsibilities for the commercial director extends beyond the refinement of business processes and procedures in BAS. The role encompasses the augmentation of the team of subordinate managers, the enhancement of market positions in diverse regions, the incorporation of novel materials into the company's nomenclature, and the exploration of novel technological directions for construction systems,

#### Vol. 11 No. 1, 2025 ·

Table 5

No.	Task	Comments	Responsible Person
1	Administration of all business processes.	Identify weaknesses in the sales structure.	Commercial Director
2	Formation of sales policy.	Set goals for product promotion in different areas and product categories.	Commercial Director
3	Organisation of a business process for managers.	Prepare commercial proposals, invoices, production orders, and transport applications.	Sales Department Head
4	Formation of production planning in BAS.	Maximise automation of the production planning process.	Sales Department Head
5	Participation in budget and sales planning.	Create a price list considering company policies, control budget and ensure margin is at least 20%.	Sales Department Head
6	Development of new analytical reports.	Create reports to control and optimise sales.	Commercial Director
7	Close co-operation with production.	Address current issues, including pricing policies for production procurement.	Sales Department Head
8	Working with overseas partners.	Procure necessary product volumes, export sales.	Sales Department Head
9	Development of a motivational program.	Align with all company founders.	Sales Department Head
10	Maintenance and improvement of company websites.	Websites should reflect current events; product list should match price list. Synchronisation with BAS.	Marketing Director
11	Work with social media.	Maintain the company's image, promote products on social media.	Marketing Director
12	Creation of promotional products.	Organise systematic product samples, arrange product samples as needed.	Marketing Director
13	Active participation in online sales.	Synchronise the prom.ua website with BAS. Receive feedback from customers on the service of completed orders, identify errors in the structure and management (receiving calls, consulting, transferring the application to the sales department, general control of the level of service for online shipments).	Marketing Director
14	Maintenance of price lists on prom.ua with up-to-date prices.	Organise automatic transfer of prices from BAS to prom.ua.	Marketing Director
15	Performance of competitive market analysis.	Search for complementary materials to increase margins.	Marketing Director
16	Creation of promotional emails to promote certain types of products by season or on demand.	Promote regular posts for all types of the company's activities according to the season.	Marketing Director

Source: developed by the authors

among other responsibilities. Therefore, the strategic tasks of the head of the Commercial Department of LLC "Baugrand" for 2023 included:

Development of sales of decorative polymer systems;

- recruitment of employees and expansion of market positions in Kyiv, Lviv, Ivano-Frankivsk, and Vinnytsia oblasts;

– after the war, the company began operating warehouses in the eastern part of Ukraine;

with the development of sales of decorative polymer systems, a new position was created (Brand Manager);
etc.

In the process of constructing the novel system, the contributions of the Sales Department Administrator are of paramount significance. The role of the Sales Department Administrator is to ensure a constant, uninterrupted flow of information between employees, clients and management, to resolve urgent work issues, to maintain proper coordination of work, and to perform a multitude of other duties. The following discussion will examine the job duties of the Sales Department Administrator in the implemented BAS program, according to the developed strategic plan, as illustrated in Figure 5.

In the context of the contemporary construction market, characterised by intense competition, the professional work of sales managers assumes a pivotal role in achieving the final outcomes of an organisation's endeavours. The preparation of commercial personnel has traditionally been regarded as a prominent indicator of the efficacy of an organised strategy. The timely communication of necessary changes in the operation of

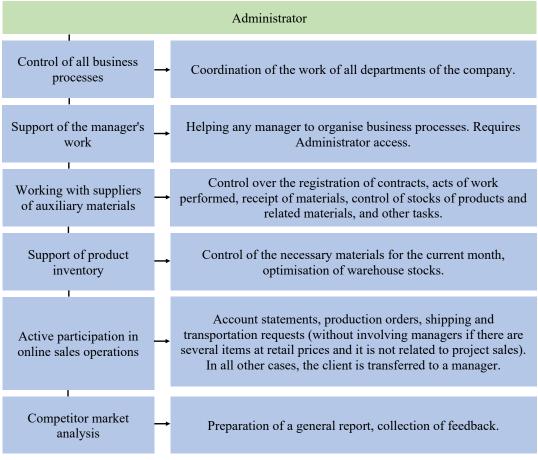


Figure 5. Responsibilities of the Sales Department Administrator in BAS

Source: developed by the authors

the CRM system, coupled with a proper understanding of one's functional responsibilities, has been shown to accelerate the completion of the task related to sales development (Bagniuk, Kuzmych, Melnyk & Timoshuk, 2019). The schematic plan of the Sales Manager's duties in BAS developed for this study is presented in Figure 6.

## 5. Sales Performance

In addition to enhancing internal communication and refining business processes, the digital system plays a pivotal role in enabling managers to establish effective mechanisms for interacting with both existing and prospective clients. By prioritising client needs, the strategic modifications made to BAS will facilitate the enhancement of the company's customer relationship management process through the implementation of comprehensive, integrated technological capabilities.

Access to specific data concerning the absolute performance indicators of sales enables the company to concentrate its efforts on enhancing them (Strauss, 2024). Consequently, within the context of this scientific research, it was of interest to develop the capability to generate sales reports reflecting the marginal profit indicator in real-time (Table 6). The timely visibility of intermediate results, in conjunction with a comprehensive motivational programme, enables the sales manager to realign their work focus in a timely manner to enhance the organisation's overall profit.

As demonstrated in Table 6, the data indicates a correlation between the net marginal difference in sold goods and both gross sales volume and agreed sales price. It can therefore be concluded that managers should focus on improving both sales volume indicators and increasing product pricing. The use of a CRM system will help identify the "weak" months and implement necessary changes in time (Yaroshenko, Podolna & Geseleva, 2015):

- Improvement of the professional level of the sales manager (increase in margins by improving communication skills and sales techniques).

- Focus on selling more marginal product groups.

- Finding the right type of customer (segmentation

by work principles, geographical location, etc.).

– Other.

The main components that influence the sales department's final results are shown in Figure 7.

## 6. Conclusions

Sales Manager				
Generating a report on the warehouse	<b>→</b>	The manager generates stocks and the movement of goods across all warehouses.		
Control of mutual settlements	<b>-</b>	The generation of reports and the control of receivables and payables are further responsibilities of the role.		
Margin report control	<b>-</b>	Formation of reports by the manager and adjustment of personal work to achieve the planned indicators.		
Creation of commercial offers	<b>-</b>	The creation of a register of commercial offers is to be undertaken, encompassing the following data: creation date, client, probability of sale, type of proposal, amount, and manager.		
Creation of contracts with clients	<b>-</b>	The client card must be completed, and a register of contracts created, including the date of creation, number, USREOU codes, TIN (in accordance with the statutory documentation), bank account details, phone numbers, contact persons' addresses, and other pertinent information.		
Creation of a delivery note	<b>-</b>	Created on the basis of a customer order. Requires the approval of an accounting employee.		
Product availability control	<b>-</b>	In the event of an invoice being settled, the undelivered products must be transferred from the warehouse to the reserve, with the possibility of withdrawal if necessary.		
Customer order creation	<b>→</b>	The creation of this document is predicated on a commercial offer. It is a universal document on the basis of which all other business process documents are generated, including a production order, a transport order, an inventory transfer order and a shipment order.		

### Figure 6. Responsibilities of the Sales Manager in BAS

Source: developed by the authors

## Table 6 Sales figures in November 2023

					,
Sales department	Plan, UAH	Actual sales, UAH	Cost, UAH	Net margin difference, UAH	Net margin difference, %
Total	4,000,000	4,119,217	3,293,477	825,740	20.05%
Manager 1 (Kyiv)	500,000	612,560	477,797	134,763	22%
Manager 2 (Kyiv)	500,000	422,148	346,161	75,987	18%
Manager 3 (Odesa)	500,000	325,408	260,326	65,082	20%
Manager 4 (Odesa)	500,000	525,004	341,253	183,751	35%
Manager 5 (Lviv)	500,000	565,004	480,253	84,751	15%
Manager 6 (Rivne)	500,000	425,805	349,160	76,645	18%
Manager 7 (Dnipro)	500,000	786,588	668,600	117,988	15%
Manager 8 (Zaporizhzhia)	500,000	456,700	369,927	86,773	19%

Source: developed by the authors

#### BALTIC JOURNAL OF ECONOMIC STUDIES

-Vol. 11 No. 1, 2025



**Figure 7. Key components of sales effectiveness** *Source: developed by the authors* 

In the contemporary business environment, strategic forecasting of the development of the construction and manufacturing business, and planning the desired

**References:** 

profit, is impossible without comprehensive customer base management. It is well established that it is more cost-effective and beneficial to retain an existing customer than to search for and win over a new one. Therefore, utilising the existing customer base is an indispensable tool in forecasting behaviour, automating relationships, and developing a justified programme for working with clients.

The role of modern digital systems in both internal and external communication of a construction and manufacturing company is indisputably significant. Nevertheless, it must be noted that these systems are only capable of solving a proportion of the functions of automated management. For effective functioning, it is necessary to create a detailed strategic plan, a comprehensive customer database, a unified information space, and so forth. Particular attention must be paid to the quality of the software tools.

The utilisation of contemporary digital systems within the operations of any company constitutes a fundamental basis for fostering innovation, thereby becoming instrumental in enhancing competitive advantages and substantially augmenting overall performance indicators.

Bagniuk, N., KuzmychO., Melnyk, V., & Timoshuk, P. (2019). Concept of formalization of relations with customers and integration of CRM-system. *Computer-Integrated Technologies: Education, Science, Production,* Vol. 37, p. 19–24. DOI: https://doi.org/10.36910/6775-2524-0560-2019-37-3

Butenko, N. V. (2011). Implementation of the CRM concept in the industrial market. *Ekonomika ta derzhava*, Vol. 3, p. 40–42. Available at: http://nbuv.gov.ua/UJRN/ecde\_2011\_3\_12

Ganushchak-Yefimenko, L. M. (2017). CRM system as an effective tool in hotel business development in Ukraine. *Bulletin of Taras Shevchenko National University of Kyiv. Economics*, Vol. 4, p. 51–56.

Hordiienko, D. O. (2021). Features of CRM-systems implementation in the activity of enterprises // Accounting, analysis, audit and taxation: modern concepts of development [Electronic resource]: Collection of materials of the VII All-Ukrainian Scientific and Practical Student Conference; May 11, 2021. Kyiv: KNEU, p. 446–448.

Matros, O. M., Melnyk, L. Yu., & Mykhailovyna, S. O. (2022). CRM system – a tool for business in social networks. *Efektyvna ekonomika*, Vol. 5. DOI: https://doi.org/10.32702/2307-2105-2022.5.89

Marusey, T. V. (2016). The introduction of CRM systems in the marketing activities of the enterprise. *Ekonomika ta derzhava*, Vol. 6, p. 87–89. Available at: http://nbuv.gov.ua/UJRN/ecde\_2016\_6\_20

Mozgova, G. V., Morozov, A. O., & Fomin, O. D. (2017). The use of CRM-systems in Ukrainian market: features and prospects. *Problems of systemic approach in the economy*, Vol. 2, p. 89–94.

Nikolaenko, I. V., & Navrotskiy, N. A. (2023). CRM systems as a component of internet marketing enterprises. *SWorldJournal*, Vol. 2(18-02), p. 151–156.

Trainor, K., Andzulis, J., & Rapp, A. (2014) Agnihotri Social media technology usage and customer relationship performance: A capabilities-based examination of social CRM. *Journal of Business Research*, Vol. 67 (6), p. 1201–1208.

Shcherbyna, O. S. (2023). Sales performance indicators at construction companies. *Actual problems of economics*, Vol. 3 (261), p. 6–15.

Shportko, H., & Vishnevskaya, M. (2021). The criteria for the choice of a CRM system. *Transformation of the tax and accounting and analytical systems in the context of modern crisis phenomena*: Proceedings of the International Scientific and Practical Conference, Chernivtsi (Ukraine, May 20, 2021). Chernivtsi : TECHNO-DRUCK, 379 p.

Shen, N., Normann, B., & Alsalous, O. (2024). "ADS-C Climb and Descend Procedure (CDP) – Collision Risk Model (CRM) Review and Comparison," 2024 Integrated Communications, Navigation and Surveillance Conference (ICNS), Herndon, VA, USA, Pp. 1–7.

Strauss, R. (2024). Data Readiness and Data Strategies ... Without Data, You Are Just Another Person with an Opinion. In: Data-Driven Customer Engagement. Springer, Cham.

Yanchuk, T., & Boienko, O. (2023). Implementation of crm-systems as a means of increasing the efficiency of

marketing activities. *Economy and Society*, Vol. 48. DOI: https://doi.org/10.32782/2524-0072/2023-48-89 Yaroshenko, V. A., Geseleva, N. V., & Podolna, V. V. (2015). Role of CRM-systems in the marketing activities of enterprises. *Bulletin of Taras Shevchenko National University of Kyiv. Economics*. No. 3. P. 81–86.

Yurchuk, N. P. (2019). CRM-systems: features of functioning and the analysis of Ukrainian market. Uzhorod National University Herald. Series: International Economic Relations and World Economy. Issue 23. Part 2. P. 141–147.

Received on: 10th of January, 2025 Accepted on: 19th of February, 2025 Published on: 13th of March, 2025