Implementing a system of Customer Relationship Management

Recurring issues and necessary perspectives of the implementation phase

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Abstract

In the mid 90’s, systems of customer relationship management (CRM) spread like wildfire across the globe and there have been a continuous discussion of what features that should be included and how much technology that should be involved. This discussion has led to different perspectives of how to utilize the systems full potential in the most efficient way and ultimately, a vast variety of different systems of CRM have been created. The challenge is no longer to create, but to implement the system to the organization with low risks and without resistance from the employees. Through a literature study, this thesis will try to identify the most recurrent issues within the implementation-phase and through a few interviews confirm that the recurring problems still exist. Due to its vast variety and the time limit of this thesis, the main focus will be to identify the most recurrent issues but not solve them.

Keywords: CRM, recurrent issues, implementation, Customer Relationship Management

1. Introduction

What is a system of CRM? In the early 1990’s a new system was created that was called Customer Relationship Management, which started to spread like wildfire across the globe. Nguyen, Sheri and Newby (2007) calls the system of CRM a digitalized staff’s knowledgebase to get and advantage of what the customer wants and then meet its needs. A CRM system can provide “powerful competitive advantage for organizations to enable them to survive in today’s market. It helps management track customers’ interactions with the organization and allows the organization’s employees to pull up all past information about the customers. Competitive advantages that organization could gain from CRM systems include the following: increase in customer loyalty, superior service, superior information gathering and knowledge sharing and organizational learning” (Nguyen, Sheri & Newby, 2007, p. 113). Thanks to its promises, it almost instantly got a high reputation which generated a high demand for this new cutting edge system and so hundreds of different CRM systems were made. In the beginning no one really knew what this system should include. It was debates of how much of the organization should be part of this system and how much technology that should be entangled to it. Most systems were in-house constructed for the specific company and its needs. But after a while companies realized that they would create some basic system of CRM which other organizations could implement directly into their infrastructure. Just to name a few of the most well-known systems; Salesforce, SugarCRM, Zoho, Microsoft Dynamics, Sage, Oracle, Vtiger, Maximizer.

“However, while CRM could promise all of these benefits, many organizations failed or have failed to implement CRM systems. This is mostly due to lack of knowledge and research, lack of project management skills, lack of commitment from the executive management, etc. To avoid wasting money and time, organizations before implementing CRM system should be aware of the difficulties, traps, and mistakes that can lead to failure” (Nguyen et al., 2007, p. 113). Meaning that high promises and high reputation makes the perfect lure and makes some organizations act without any consideration or a thorough analysis before investing in this new system. Sheth (1996) stated, as early as 1996, that there is much research that remains to be done in the exploration of the multifaceted nature of CRM. This was stated when CRM still was
very new, but in 2003, Zablah, Beuenger and Johnston (2003, p. 167) expressed the sentence: “further exploration of CRM and its related phenomena is not only warranted but also desperately needed”, which means that there is still an interest to explore this topic on a more detailed level. To add some details within this topic, I would like to focus my thesis to enlighten the difficulties of the implementation and argue for what might be the most recurring issues in its implementation phase, and open up for further studies on solutions, with the research question;

“Which are the most recurring issues in the implementation phase of a CRM system?”

Due to its multifaceted nature, there will be a short presentation of what CRM is and what path this thesis will focus on. Meaning that the debates of how much of the organization that should be included and how much technology that should be entangled to it, still are an ongoing discussion. After a short summary, there will be a comparison of what recurring issues that have been found and in the end a discussion of the results.
2. CRM

Why implement a system of CRM? As Chen and Popovich (2003) describe it, it’s a combination of people, processes and technology to understand the company’s customers. It’s an approach that focuses on managing relationships between the company and the customer and how to develop and retention it. If done right, the reward will be customer loyalty and long-term profitability. Thanks to its three basic components; company-wideness, cross-functionality and customer-focus; gives the company a shared base of information which eases many processes across the enterprise.

“Customer Relationship Management (CRM) is a business strategy for improving profitability by focusing on customer needs and creating an attentive relationship with the customer. It involves a personalized and interactive approach for the entire customer lifecycle” (Fletcher & Alan, 2001, p. 540).

Bain & Company (2013) is one of many firms of consultants that representing the system of CRM and they describe it as a process companies use to understand their customer groups and respond quickly – and at times, instantly – to shifting customer desires. CRM technology allows firms to collect and manage large amounts of customer data and carry out strategies based on that information. CRM data also provide companies with important new insights into customers’ needs and behavior, allowing them to tailor products to targeted customer segments.

In short, a system of CRM is a system based on the company’s customers and how the company can provide the best service and product for this customer. The system will focus on the relationship and the aim is to gain loyalty and long-term customers.

2.1 Customer in focus

It is well debated of what should be included in a CRM and its exact meaning. Through these different ways how to look upon CRM and its exact functions that fulfills the company, some try to explain and visualize the fundamental starting points. Ryals and Knox (2001) goes into the service sector as a separate, important detail and argue that the focus should be placed at “four relationship-based tenets” (Kutner & Cripps, 1997, p. 535), which they refer to as what CRM is founded on;

- Customers should be managed as important assets.
- Customer profitability varies; not all customers are equally desirable.
- Customers vary in their needs, preferences, buying behavior and price sensitivity.
- By understanding customer drivers and customer profitability, companies can tailor their offerings to maximize the overall value for their customer portfolio.

Ryals and Knox’s (2001) customer-in-focus point of view are explaining the need to reconstruct the company’ infrastructure after the customers demand and need. Ryals and Knox (2001) describes the company’s infrastructure as a “continuous improvement or re-engineering” (Ryals & Knox, 2001, p. 535) shown in the figure 1.
Ryals and Knox (2001) argue that all departments within a company could be seen as different ‘relationships’, which all need to work close together in order to achieve a higher value, both for the system itself and the company. Meaning that the company needs to reconstruct its infrastructure to meet the customer needs. Just as figure 1 shows in the bottom side of the arrow, there are lots of instances within the company that are involved and needs to work together to gain a flexible and cross-functional foundation – to be able to reach out to their customer.

In short, the philosophical bases of CRM “are a relationship oriented, customer retention and superior customer value created through process management. IT is the ‘glue’ that holds these together and enables the whole to be operationalized” (Ryals & Knox, 2001, p. 535). For this system to maximize the return on customer information, it requires that IT and Marketing work closely together. The results of this perspective in the implementation affect the whole company and a degree of cross-functional reorganization will be necessary.

Ryals and Knox (2001, p. 535) summarize the key characteristics of CRM in eight bullet points;

- A customer relationship perspective aimed at the long-term retention of selected customers.
- Gathering and integrating information on customers.
- Use of dedicated software to analyze this information (often in real time).
- Segmentation by expected customer lifetime value.
- Micro-segmentation of markets according to customers’ needs and wants.
- Customer value creation through process management (Hammer and Champy, 1993; Hamel and Prahalad, 1994)
- Customer value delivery through service tailored to micro-segments, facilitated by detailed, integrated customer profiles.

A shift in emphasis from managing product portfolios of customers, necessitating changes to working practices and sometimes to organizational structure.

### 2.2 Implementing CRM

After the initial thoughts of strengthening the company through communication and cross-functionality, as presented in figure 1, there were still gaps that needed to be researched. The
statement of using IT as ‘glue’, doesn’t come with any instructions or any measurement – which led to a discussion of how much technology that should be involved and entangled between the new system and the company. Due to this new area, there was a need for developing a conceptual framework that could list and visualize the complexity of implementing a system of CRM. This conceptual framework’s empirical foundation is based on combining any previous literature, common sense and experience (Eisenhardt, 1989), with an approach of interaction research (Gummesson, 2002). The idea was to first establish the issue of CRM’s association with technology and under the statement “interaction and communication play a crucial role” (Gummesson, 2002, p. 169), Payne and Frow (2005) started to research within this issue. Payne and Frow (2005) argues that its association with technology is what gives a certain definition and in the beginning there were a lot of conflicts whether or not CRM should be seen as an IT solution or something more. Payne and Frow argues that there is a clear difference between CRM and CRM technology and that they shouldn’t be equated, due to the fact that “its definition significantly affects the way an entire organization accepts and practice CRM” (Payne & Frow, 2005, p. 168). To reduce the misunderstandings about CRM and CRM technology, Payne and Frow created a figure (figure 2) that will clarify the three most common ways of how to look upon CRM. The Narrowly and Tactically defines the more technologically approach and the Broadly and Strategically defines the more holistic and customer value creation approach.

*Figure 2, "The CRM Continuum" (Payne & Frow, 2005, p. 168)*

Due to the conflict of how much technology that should be involved, there are numerous of different CRM’s created through different believes how to target their customer as good as possible. With the understanding that the initial core focus should be to strengthen the relationship between the company and its customer, no system is wrong regardless of the IT involvement. Instead, figure 2 visualizes the width of how CRM’s could be created and focuses on categorize the different systems to add some initial guidance of how flexible this type of system can be. In figure 2, some types could be narrowed down; operational, analytical and collaborative. These three are the major types (Iriana & Buttle, 2006, p. 24):

Operational CRM comprises “*the business processes and technologies that can help improve the efficiency and accuracy of day-to-day customer-facing operations.*” This includes sales, marketing, and service automation.
Collaborative CRM comprises “the components and processes that allow and enterprise to interact and collaborate with their customers.” This includes voice technologies, Web store-fronts, e-mail, conferencing and face-to-face interactions.

Analytical CRM “provides analysis of customer data and behavioral patterns to improve business decisions.” This includes the underlying data warehouse architecture, customer profiling/segmentation systems, reporting, an analysis.

Later research discovered a fourth major type of CRM; The strategic (Payne, 2006; Payne & Frow, 2005, p. 25);

Strategic CRM encompasses the strategy development process and the value creation process, and therefore answers questions such as what business are we in? which customers do we serve? and how do we create and deliver value to these customers? Operational CRM is focused on the management of the virtual and physical channels through which customers and organization communicate and transact. Analytical CRM is focused on the development and exploitation of customer data.

With figure 2 as initial guidance to find an angle that would fit a specific company, there was still no holistic perspective that the management could use when they implement the new system. So far, it’s just promises and, as said, some guidance for a type or angle. So, to fulfill the thought of creating a conceptual framework there was a team put together of highly experienced people that covered all the different specific areas that are mentioned in figure 2. The group was called the METAgroup (2001), which was the same group that defined the operational, collaborative and analytical angle of the CRM. The team succeeded with a conceptual framework, which included five major areas, which all of them are divided into specific elements – “with the purpose to be a potentially useful starting point for development of improved insight into these aspects of CRM theory” (Payne and Frow, 2005, p. 174). These five areas constitute a strategy framework for CRM and is further presented in the next section.
2.2.1 CRM strategy Framework

Figure 3, "A Conceptual framework for CRM strategy" (Payne & Frow, 2005, p. 171)

Just as figure 1 showed, the system of CRM involves the complete company and what is learned from figure 2 is more details of what each area includes. In figure 3 it’s visualized how all these parts are put together and the result is a conceptual framework showing the complex cross-functional relationships between the major parts within a company. To understand the framework, all five major areas will be explained.

Strategy Development Process; “This process requires a dual focus on the organization’s business strategy and its customer strategy. How well the two interrelate fundamentally affects the success of its CRM strategy” (Payne & Frow, 2005, p. 170). The Strategy development part is divided into two elements; the Business Strategy and Customer Strategy. First, the business strategy needs to be considered before the customer strategy can be created, due to the simple fact that without the business strategy there are no market targeted, meaning that there is no target group to focus on before the business strategy is completed. When there is a clear view of what the business should work with, the customer strategy could be included, which for many companies is the same as working with demands and marketing. What does people want and how can we best show them that we have it?

Value Creation Process; The value creation process takes the output from the strategy development process and transforms it into programs that deliver and extract value. This area are divided into three elements which “(1) determining what value the company can provide to its customer; (2) determining what value the company can receives from its customers; and (3) by successfully managing this value exchange, which involves a process of co-creation or coproduction, maximizing the lifetime value of desirable customer segments”(Payne & Frow, 2005, p. 170)
Multichannel Integration Process; The multichannel integration is one of the most crucial areas, due to the fact that it’s within this area where it’s going to be a selection of what channel that are going to integrate with the customer, which ultimately will be the value-adding factor. There are six elements that are used in this framework that shows all channels, and they are labeled from physical to virtual – with the meaning of what grade of personal contact the employees’ are having with the customer. There are seven elements in total within this area and the seventh element that is not included within the different kind of communication channels, are the integrated channel management which stands for the management of having a high standard of all the channels that are used. The aim is for a “perfect customer experience” (Payne & Frow, 2005, p. 172) which can be achieved from combining factors such as what the company can afford, be within the boarders where the company operates and keep track of the competition to never fall behind in terms of standards.

Performance Assessment Process; Performance assessment is monitoring the performance standard to always deliver a product that are accepted by the company’s standard and establish future improvements. Within this area, there are two elements; the first one focus on the shareholder results which includes getting information from the different shareholders and customers which ultimately could lead to a reduction of any cost. The information is collected from such sources as a telephony and web self-service. The second focus is monitoring performance which could be in terms of customer satisfaction. This is of high value due to the simple fact that there should never be any changes to the standard which could have an impact of the company’s reputation.

Information Management Process; which can be seen in figure 3, information management is involved in all steps, just to “generate customer insight and appropriate marketing responses” (Buttle, 2009, p. 43) which works as a memory of what have been successful and what haven’t. Except keeping track of the customer, this information is also used to keep track of different relationships, such as between the company and the supplier. This area is divided into five elements that describes and dive deeper into each process and system that are used to track and store information.

“The battle for customers has never been more intense. Deregulation, diversification and globalization have stimulated a dramatic rise in competition – and these unforgiving marketplace realities have forced companies to switch from a product-centric approach to a customer-centric approach. CRM depends on ‘systems’ to support continuous interactions, fast feedback, adaption and proactivity. Technology alone cannot do this. Therefore, the companies need to understand how they are going to fill these gaps.” (Chou, Lin, Yen & Xu, 2002, p. 451)

Meaning that there is a need to have a complete understanding how entangled all departments are within an organization and that just one new system can’t alone solve all the problems. There need to be a high focus on the cross-functional aspect – not only that the system itself has a high focus on the cross-functional aspects, but that there need to be a high focus within the organization overall.
With this understanding, the main function for this framework would be to help the organization to find delimitations for to be able to custom-make their own CRM. As said before, the system of CRM have a focus on the customer and different ways how to reach out to them and through this develop a framework that is custom-designed for a specific organization and their specific customers. Although, it doesn’t include the employees’ individual struggles nor issues with new systems. For instance, a person that don’t have high computer experience or feeling confident while using new systems, might need a longer time to learn and adapt to the new system. This could result in a mindset of being resistance to any changes in this topic, from the beginning. However, through a strong infrastructure there will always be ways to gain knowledge and help.

2.2.2 The great potential of CRM

As explained so far, there are lots of promises of what this system can do for a company, which makes the perfect lure. The management sees the system of CRM as an opportunity to bring a lot of benefits for the organization, which makes companies rush into decisions of implementing CRM, and when some of the leaders of the companies were asked why they decided to implement CRM systems, they responded that this is the most advanced technology and that the company management need to have it if their competitors have it (Chou et al., 2002). CRM is somewhat depending on the technology, but what they need to keep in mind is that it only works if it is supported by the corporate culture that embraces customer-focused aims. Without the comprehensive understanding of customer-focused objectives, the company will find it very difficult to really leverage this cutting-edge technology. Simply meaning that the company management can’t implement a system without giving any directions of how or what the employees are going to use this system for. It’s preferred to add a mutual knowledgebase where everyone, in every layer of managerial can get information so they can carry out their work. There is also a need for this knowledgebase just for to give everyone the same information so there will be no misunderstandings. This ultimately means that the management might need to change its infrastructure.

CRM involves improved increased communication within a company itself as well as between the company and its customer. With this in mind, Chou, Lin, Yen and Xu (2002, p. 442) argues that “A CRM system will change the way information flows within a company. CRM is not just technology”. Companies that only sees CRM as a tactical step and only focus on its technology might fail in its implementation and the authors argues that CRM should be looked upon as a company strategy that needs to be carefully designed and with full sponsorship from the employees. It have been reported that 70 percent of CRM implementations fail due to the lack of support from the employees.

Employees’ resistance is one of the major risks associated with CRM implementation. What this means in practice, is that management could face so much resistance that it fades out and there is no implementation. What makes this issue even harder to comprehend is due to its duality in its origin. It could be based in almost anything; the employees don’t like the manager, as a person, and tries to work against her, the employees don’t want this new system because they like the system they have right now, the employees don’t feel that they are getting the time that they need to have to learn the new system, etc.
There are also some issues that the company can’t surpass, such as abiding laws. CRM involves a lot of legal and security issues. For example “on June 30, 2000, President Clinton signed ‘Electronic Signatures in Global and National Commerce Act’. The Act clarifies the legal validity of electronic contracts, signatures, notices, and other records, and allows contracting parties to choose the technology for authenticating their transactions without government intervention” (Chou, et al., 2002, p. 446). The Act also includes equal legal protection for the consumer whether or not they are online or offline. Worth mentioning is that there are some differences between countries and states about these laws related to the right of the consumer online, but there is a big discussion of what needs to be basic established. “Consumer retain the choice to do business and receive records on paper or online. Before notices and disclosures may be sent electronically, consumer must give their consent and the firm must verify that the consumer will be able to access electronically the information that will be provided” (Bevan, Galbreath & Heth, 2001, p. 445).

CRM change a lot within the company itself, but it also changes how to keep the costumers. It would be both ethically problematic and illegal to simply just keep track of them with software surveillance, to get feedback of how they use the service or product just for to update it in their favor. And the company can’t keep the costumers’ data in a non-secured database which could be hacked or intruded in some other way. To avoid all these problems, the company needs to be aware of what the laws says in their specific location – which could impair the prerequisites for the CRM.

The environment is a huge part to CRM, both within the company itself and within different kinds of markets. But there are some basics that are working throughout most of all the markets such as, improving the customer service, developing more effective marketing programs, and increasing the efficiency of the sale service will strengthen the relationship between the company and its customer. There is a high focus on collecting information from the customer and the key for any CRM strategy “is the ability to acquire and effectively use customer and partner relationship information.” (Chou et al., 2002, p. 447). However, to acquire this information, the customer need to be willing to share it. There should always be a high focus on demands and adjust after the customer, market and technological tools.
3. Method

This thesis is a contemporary knowledge review based on a literature review and supplemented by two interviews. To get a perspective of what CRM is and what affect the implementation-phase has on a company, five articles was chosen. Why just five articles were chosen was because only they passed the criteria’s of focusing on the implementation-phase and that they had a high rate of citation. The google function google scholar was used with the keyword customer relationship management while search through their library. It was of great importance to use the keyword customer relationship management due to the fact that the acronym could have different meanings. The five articles was analyzed and coded to see what categories the authors discussed as a recurring issue and how many times it was mentioned. After the analyzing was done with the articles, there were two interviews made to strengthen my arguments later on in the discussion part of this thesis. Why just two interviews was due to the fact that it was their complete staff within the IT department. Their firm was during this time when the interviews was made, in middle of an implementation phase of a new system of CRM, which gave me an unique opportunity to get an insight of what issues they had come across and what their strategy is now when they implement the system.

3.1 Data collection

While looking for the articles, I chose to use the search engine scholar.google.se. It’s a search engine developed by google, just for the sole purpose to find scholarly literature such as books, articles, abstracts and theses. It was chosen by my personal belief that it would be the best source of finding the articles I needed. I typed the word “customer relationship management” and chose the top five alternatives. This was the top five results during the time this thesis was written, meaning that this most likely would change over the time. This also due to my personal belief, that the top results would bring me the best data. I had heard from a teacher that the quantity of how many citations the article had could work as a light version of metric. Meaning, the more citations the article has, the more people have used the article, which ultimately could translate to a value of appreciation, thus validating its content. All articles, except one, had above 230 citations.

The respondents for the interviews work in a small traveling firm, with the focus on combining a destination with some local attractions. The firm has been in business since 1997 and has today 15 employees. During the time the interviews took place, they were in middle of an implementation-phase of a system of CRM, which made it very interesting to follow. The two respondents wanted to be anonymous, meaning any further information could reveal their identity and will be referred to as ‘Senior’ and ‘IT-Manager’. For the interview, there was a separate method. It was a semi structured interview guide (Dalen, 2008) made for the sole purpose of keeping a focus on premade questions and giving less room for floating away from the topic. Why this was performed in this specific way was due to the lack of experience of the interviewer. Through ‘appropriate selection’ (Strauss & Corbin, 1998), there was only IT-involved respondents chosen for these interviews. Thanks to the respondents’ higher positions, they could also provide a comprehensive overview of the company, with every detail that would be of importance for this thesis. These qualitative selections characterizes with the fact that they have knowledge that are wanted for this thesis, and that is why I chose them who can
deliver that knowledge (Hartman 1998). After the interviews were done, the data was cross-checked with the analysis that was made of the articles to see if they had any common recurring issues. Tablet 1 shows the length of the interviews, positions on the firm and their pseudonym.

<table>
<thead>
<tr>
<th>Respondent</th>
<th>Position within the firm</th>
<th>Length of interview</th>
</tr>
</thead>
<tbody>
<tr>
<td>IT-Manager (ITM)</td>
<td>IT-Manager</td>
<td>42:28</td>
</tr>
<tr>
<td>Senior (S)</td>
<td>Senior IT-Manager</td>
<td>35:04</td>
</tr>
</tbody>
</table>

*Table 1, “Respondents at travel firm”*

While having the method for collecting and processing the data that is used for this thesis, it’s also following the framework of the CRM that are presented. Due to the fact that it extends over the entire company, it would be a great issue to know where to look for the information and in what extent. So, the framework presents all the important topics it affects, which are used as a scope for this thesis. It validates the examination of the topics.

### 3.2 Data analysis

As said, this thesis is a contemporary knowledge review based on a literature review and supplemented by two interviews. The literature review are following a basic guide, meaning to provide the thesis with a background, evaluate the data and putting it all together to see if there are any remaining questions (Bell, 2005). By revealing the gaps in the information discussed through the articles, it provides a relevant path to answer the research question. So, the critical thinking while reading are an essential grounding pillar for this thesis when it comes to the articles and reviewing them (Boote, 2005). As said before, a standard strategy was used while reading – by taking notes and creating categories, while always reflecting over “what does the literature tell you?” and “what does the literature not tell you?” (Bell, 2005, p. 46). There was a slight difference in this literature review, due to the heavy focus on the comparison. The main question that was always present was “Do the authors make similar or different arguments?” (Bell, 2005, p. 47). It’s part of the strategy to organize the main points, to support the argument – which is done by presenting the categories that was made and used throughout the complete thesis.

By following the literature review guidelines (Bell, 2005), I took notes while reading through the articles, which translated into categories. Each category was made per each new issue that was mentioned or discussed. Thus, nine categories were created and it visualized what issue each author mentions. This gave a holistic perspective of what issue that was most renowned.

When the articles had been analyzed, it had given a foundation for the questions for the interviews. I wanted to ask the respondents broadly within each area that the framework include and ask them simplistic questions about the issues that was mentioned from the articles. My intentions were to see the reactions from the respondent and try to immerse in the subject or issue they thought had the largest impact during the implementation-phase. The interviews were conducted in person at the respondents own office. The interviews were recorded and afterwards transcribed to enable the same analysis as the articles has been through. This was made to see how many categories that matched with the ones that were mentioned in the articles to continue build on the holistic perspective. It would also have been
interesting if the respondents would have encountered any issues that weren’t mentioned in
the articles.

All the data that was collected was later compiled into a tablet for comparison.

3.3 Methodological limitations

The method used for this thesis has some limitations that could affect the result, or at least
seem to have an impact. For starter, the low number of articles used and respondents from the
interviews. The year when the articles and figures were published. The fact that there still is
knowledge gaps within this area of expertise – there is no perfect answer nor approach which
could be standardized and used for each and every organization. To be fair, there are a lot of
different aspects that needs to be considered within a CRM, meaning that there are few articles
exclusively focusing on the CRM as whole. This also gives the few articles written within this
specific area a depth that could only be achieved through a broad empirical background. The
number of interviews is low, that’s why they are used as a supplement – to gain information
from a different source. What could be worth, once again, to mention is that even thought it
was only two participants, it was their company’s complete IT-staff.

The articles are year’s apart showing the frequency of published works, but shows the
reliability – the issues are still the same and there is still a struggle in generating an exact
answer for this issue. Meaning that the issues are still current, but there are just few studies
done within this topic. This makes a small but reliable platform for this thesis.
4. Results

Through the analysis of the articles, it’s been said that from a marketing perspective, CRM identifies and targets best customers, it helps to identify new markets and strengthen the relationship between the company and its customers. It doesn’t only improve the customer loyalty, but also making the company itself more efficient. With CRM, the company can keep track on so much more information which in its turn helps making clear goals which helps creating and manage sales. This information also makes a higher value for both the customer and the company, which ultimately improves the product development process.

From a sales perspective, CRM increase the sale-rate due to the real time information that’s shared between the employees, plus the information that could be collected from the customers. The customers feel more confident when they get real time updates through their accounts. This will give the company good reputation which will increase the revenue per each call the salesperson makes.

From a field services perspective, there will be a focus on customer satisfaction by solving the customer problems as quickly as possible. Thanks to the system of the CRM, the people of within the service portals and the management of this are smoothly woven in to the complete system which gives them more information to work with and the answers they can give both internally to their staff and to their customers are more concrete which will decrease the length of each call and if there would be any changes, it will be transparent enough so the customer don’t feel that they don’t know what they are investing in.

From the perspective of the customer support, all this transparent flow of information will strengthen the individualized problem that could occur. Other than this, there will be a huge record of known problems and solutions which makes the support more efficient. With all this knowledge, it could first of all extend the web-based support which will take care of most of the customers’ problems and secondly it would let the company to reduce the cost of a staffed support. Collecting feedback of customer satisfaction from the different help-forums would bring the information needed to develop the channels of support.

4.1 Results from literature review

During the literature analyze, notes was taken for each problem discussed and mentioned. These problems were then made into categories that were used throughout the analysis, to see what the most discussed problem was. Through this measurement, nine different categories were found to be the most mentioned;

Knowledgebase (1) – If the employees and managers have the information collected in a knowledgebase where they could find answers to their questions that would come along the way. It would also serve as a joint platform across the company, meaning that every employee will get the same information from the management and vice versa. By given everyone the same information, it would improve the speed of responding to the customers’ new needs. Simply put, enhancing flexibility. This would also enhance the general information spread and the complete company can work united with current issues instead of one department at the time.

Employees (2) – There is two aspects in the category and that is ‘sponsorship’; If the employees want this and if they support the new system that are implemented, and ‘resistance’; Pretty similar to the sponsorship except that a group of people can just accept the fact that they
are given a new system to work with, without being for or against it, which would be counted as if they support it. If they just accept it, not cordially, but just ride with the tide – they will use it. Resistance in the other hand is if the employees don’t want it and are working against it. This could take form in everything from if they don’t use the system in silence to that they make a dramatic scene and join forces to remove it.

Finding profitable customer (3) – If the company can find the customers that they need for to create long-term profitability, or realizing that they need to change to keep up with their already existing customer. As said earlier, there are three key elements of the value creation process (section 2.2.1), which describes the entanglement of the shared value between the customer and the company – by successfully creating a high value for the customer, it would maximize the lifespan of the customer retention.

Company communication (4) – There is two major parts of company communication that are extremely important aspects of CRM. First of all that the company have an understanding that this new system will change the workflow within the company which needs all departments to be open with information to all other departments within the company and have a consistent dialog to be as efficient as they can and fully take advantage of their potentials. The second aspect is that most of the bigger, and of course some smaller companies too, could spread out their offices all across the globe which makes it important to treat them exactly like if they only was a department within one big facility. This category also concerns the cross-functionality within the company, meaning that this category includes both the internal and external communication.

Budget (5) – As said before, CRM are mostly if not always long-term focused. This means that the company needs to keep in mind that they could lose a little in the beginning, but then gain tenfold after a few years. This in turn means that the company needs to have a budget for this implementation. Which ultimately means this system could be a luxury system that no start-up company could implement. It’s a problem that could grow with time, due to cheaper alternatives of system that handles different parts of the company. As soon as there is some money, a new system is bought to support one issue at the time, which misses the whole cooperation-part of a CRM.

Law / Security (6) – The company’s management needs to be aware of the laws so they could properly follow them and actually take advantage of them. For example, a few things that are illegal in Europe could be legal on China or in a state of USA. Of course depending on the market. The same goes for security – there need to be awareness and a ‘know how’ to store crucial and vulnerable information. Especially when CRM are customer focused – it would affect both the company and the customers if their personal information wander around on the World Wide Web.

Feedback (7) – To actually know if the company’s methods and system are working, they need to get feedback. Both from the in-house users and the customers. This will help the company to evolve and sharpen their tools for the job. Due to ethical constraints, it’s not possible to monitor the customers. This makes any feedback that could be received essential to the continuous improvements of the system and enhancing the flexibility for efficient and fast changes depending on the customers changing needs.
**Environment** (8) – To see if there is any problem within the company’s work environment or if their market environment is the right for them. This also includes the virtual layout and design with the system. A system could be advanced and including all the solutions and features that the company need, but it could be too advanced for the employees. Meaning that even if there are solutions to their problems, it can’t be solved due to problem in understanding the system itself. As said, a system of CRM could change a lot, both the structure and the infrastructure – so this category sees how good the employees acclimate to the changes.

**Performance metric** (9) – To have and use any specific method to measure the performance of this new system. To reassure that the system actually helps the company. If there is any struggle of finding the right way to be able to make these types of measurements and in what way.

Each category was given a specific number in order to distinguish them from each other’s and make it easier when it comes to the data analysis later on. After establishing what was mentioned, it just had to be counted to see which one that was mentioned the most.

The tablet 2 will simplify the table 3, to show what letter each article has. The tablet 3 shows the results from the analysis of the articles – the ‘X’ marks what category the article mentions;

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Table 2, “Articles acronym”

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Table 3, “What issues the articles discussing”
Just as table 3 shows, the analysis from the articles resulted in nine categories that were top ranked of these issues. The third category, ‘finding profitable customer’, seems to be somewhat obvious due to the fact that it are one of the initial thoughts why companies want the system in the beginning. To “determine how existing and potential customer profitability varies across different customer and customer segments” (Payne & Frow, 2005, p.172) in terms of value creation both for the customer and for the company. This determination usually puts the first version of a scope for the upcoming system of CRM. Meaning that it was highly considered to top the issues. One way to create this value and to make the initial delimitation for the system would be through a knowledgebase that best describes both the company itself and its employees. This confirms the statement “by using CRM, marketing intelligence, customer database and interactive communication technologies are combined to enable companies to better address customers’ individual needs” (Chou et al., 2002, p. 444).

4.2 Results from empirical field study

The initial thoughts of implementing a system of CRM are based in their current system. As how it was before, they didn’t have any united database where they could collect all of their clients which made each salesman locked to their specific customer. What this mean is that one salesman get all of the information from one customer which he saves in a personal folder in his own computer that only he has access to. So if this customer would call the firm when this specific salesman is away from the work, they need to collect all the information ones more and they can’t see any history of how they handled this customer, what was ordered nor what feedback they got. This causes frustration both for the customer and for the team of salesmen. Senior said that “so, if the salesman who had all the information about a trip was sick and stayed home – no one could know where to look for the information that was associated with this trip”. Due to all this hassle, they chose to implement a system based on their target area, the relation between the customer and the salesman, thus making the choice of a system of CRM.

Just as Senior, IT-Manager wanted a system so they could have a joint database throughout the entire organization (category 1, knowledgebase). Or in his words; “Having a comprehensive base of knowledge within the company, increases our knowledge of our customer and collaboration partners”. Other than focusing on making their system more efficient, they also get real time updated reports that shows how everyone is doing which would be a quick way to get feedback and a roughly trimmed first peek on the statistic how well the firm is doing at the moment. The plan was to try to fit as many dreams and visions into one system to cover all their needs, as Senior mentioned; “we had very high visions and wanted in the start to also link the system with the economic department, to be able to integrate reports and more. We weren’t able to do everything we wanted due to our budget, but that made us also think ‘why would we need that?’” (category 4, company communication).

Except the budget (category 5, budget), their only thoughts was to try not to be too technical. Why this was such a huge part of their main thoughts when they were searching for a fitting system was due to their employees. They already have a focus on their salesmen and their relation with the customer, and then they wanted their salesmen to feel that they want the system and feel the need for this new system. As IT-Manager told me; “the employees have a
split view of the system. Most of them are in their forties, which mean that they have been through a few changes in their work processes and in the system they work in. So most of them just think of it as ‘another system’ and are a little skeptical.” But this could all understood as he also mentioned that “especially when they have been through some changes where they can’t see the need for a new system and only sees that the system costs more than it delivers.”

Senior told me that; Three out of ten thought it was good, but most of the employees were very questionable against this new system and asked ‘why would we need this?’ and ‘what was wrong with the old system?’” (category 2, employees).

This state of mind, where the salesmen are skeptical for the new system independent of what it does and why they should implement it, creates a mental barrier that the IT department needs to break before they can actually put the system in use. As they saw this problem, they first of all created some workshops where the salesmen got to try out the new system with some supervision and support. Senior had made some slides for a power point presentation of eight pages, but in the end they had thirteen. “Most of what we added to the slides was things I hadn’t thought of, which I thought was irrelevant or didn’t think of at all. The salesmen gave me direct feedback which we could discuss.” This is a perfect example of how their perspectives of a process can differ and if they get all necessary feedback (category 7, feedback) before the implementation they have a chance to make a system that fulfills all the needs. While this workshop was going on, Senior tried to influence the salesmen with some short arguments such as “isn’t this good?” while showing how easy this new system was meanwhile calling the old system clumsy and very limited. He admits that it’s very leading, but they need to unite their salesmen towards this new system so they will have a positive reaction when it’s implemented.

This was also part of the IT-departments plan, to actually try to lead the salesmen into positive thinking about this new system. IT-Manager explains this; “I have implemented about three or four other systems and it has always been a challenge to sell the idea to the employees. You need to be very perceptive if the employees give any feedback of what works and what don’t. Because it tends to be very relevant and you always need to invest as smart as possible so one user can see a concrete benefit from using the system.” This will also strengthen the loyalty for the new system, as IT-Manager continuous with; “If you take their concerns seriously and if they will feel that they are involved in the creation of the system and will then be more interested in using it”. With all this said, he gave me a small advice; “Try also to be much defined of what will be included in the system – start very small and then build out the system when they got a hang of it. Let them learn each step completely”. (category 8, environment)

The analysis is put together in a table.

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*Table 4, “What issues the respondents discussing”*
What can be ascertained from the tablet is that both the IT-Manager and the Senior IT-manager are answering very similar. They had different work objectives when the system was implemented, but they got the same feedback from the employees and came across the same issues. Unlike the articles, they found the employees to be the most charged category and had to put a lot of effort in this to be able to implement this new system. They already know who their customers are and how to reach out to them, this system was more to strengthen the infrastructure of handling the data that was collected from each customer so there could be a strong cross-functional knowledgebase. They mention that if they have one employee that is sick or away, they can’t help the customer that is ‘attached’ to that salesman.

One result that could seem more interesting is category 5. The answers from the interviews are the only ones that really focus on a budget. It’s a smaller firm and they don’t have enough room for mistakes, which makes the budget essential for this implementation. Otherwise, through the article analysis, the budget has been seen as something obvious – it’s not whether or not you can afford it, it’s not even thought of if there would be some mistakes made or something fails along the way, how it could affect the company economically.

4.3 Most recurrent issues
From the research based on literature analysis and analysis of empirical observations done within these articles, one conclusion that could be drawn would be that there are a couple of recurrent issues. To bring such a huge system as a companywide system of CRM will leave its marks, and will most likely change the entire organizational infrastructure. This is independently of the fact that there are different kinds of systems for CRM due to, first of all, that there is no exact way of what the systems should contain in functions or technology and lastly that there is no exact measure of how much of the company it will include or where its precise focus should lie – either on the customers or even within the company itself. Just to point out, the focus with a system of CRM is of course on the customer relationship, but there are different ways to achieve this relationship and the two of them are either to focus on the customer and change accordingly to increase the meeting with the customer or to focus on the company and change it accordingly to achieve a better relationship with the customer. The only thing that is consistent is that there will always be a change in the organizational infrastructure. The major factors that cause the most recurrent issues are presented in table 5. The table presents both the results of the articles and interviews in order to visualize the most recurrent issues;

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*Table 5, “Summary of results”*
By counting the marked categories, this tablet shows the most recurrent issues, which are ‘Knowledgebase (1)’, ‘Employees (2)’, ‘Finding profitable customers (3)’ and ‘Company communication (4)’.

Knowledgebase are mentioned and discussed throughout the complete thesis. By creating a joint platform of information seems to be one way of connecting all different departments of a company together. It’s been discussed in terms of definition and description of the foundation for this type of systems. “It’s definition significantly affects the way an entire organization accepts and practices CRM” (Payne & Frow, 2005, p. 168), based of utilization of efficient information management. Meaning that the system will be as advanced as the management believes that employees are capable of handling. Instead of teaching the employees a new system, the management wants to implement a system that could be used directly. Preferences like these affect the delimitations, hence making this a well discussed topic.

Employees were well discussed throughout both the articles and from the interviews. It’s not a secret that there is a need of focusing on the employees, but it’s however a more of a complicated fact to discuss. There is a need for the employees’ complete support and to reduce as much resistance as possible for to be successful. The thing is just how to target the employees and how to set them in focus. This is an ongoing discussion whether or not it’s the individuals within the staff that are to blame if the company are not doing too well, or if it’s the system that they work in or the assignments they are given by the management. What could be concluded is that a staff with a positive attitude can generate higher values, on all levels of the company.

Finding profitable customer. There is not too much to add to this category due to its context base, meaning that it depends on what product or service the company could provide. Of course there needs to have profitable customer, otherwise the company would go bankrupt. But, the way it’s been discussed throughout the articles haven’t generated any exact way how to find them. This category came to be more to raise awareness of its impact on the company. A point that could be of value, is the fact that it’s only mentioned in the articles. This deviation would lie solely due to the fact that the travel firm implemented their system for an already existing customer where they wanted to focus on being able to manage their customers, instead of trying to find new ones.

Company communication. There is a major issue within some companies with the communication between the departments and in some cases it has gone so far, that they actually have alienated the departments from each other’s. This problem stems from different causes, and are most likely very unique for each company it affects. The discussion of this issue was that it could in some cases be addressed, solved and strengthen through some minor adjustments. But, it could just as easy be even worse when some outsider tries to interfere and solve the situation.
5. Discussion

CRM is relatively new and in the beginning the problems was in determining what features it would include and what area it would concentrate within. Hence, we have a huge selection of different variants of systems that focus on different angles. Today there are many systems and the different perspectives have contributed to a variety of systems that created a market where there can be found a system that suits one’s business best. The problem is no longer in the system, but from what we can see in this thesis, it is due to non-static resources, such as the personnel and the customers.

Just as the figure 1 (“CRM as a series of relationships”) shows, there are different ways of thinking when it comes to implementation of CRM. One of the way to know what to choose is to start with the figure 2 (“CRM Continuum”). It will establish how much technology that needs to involved, while providing an opportunity to reflect on what departments it shall include, the most. Why not think of the company as whole, when adopting the system, are up for the management. To focus on a few departments in the beginning and then involve more and more could be a good way to secure a success. All focus lies within the department that are going to use it the most, and let them have all the consults and all help that they need to completely understand the system. There needs to be an awareness of the fact that if there is a change in the system, it will change the workflow which ultimately will change the organizational infrastructure and culture.

In theory, there shouldn’t be any problem. There would be reduction of some extra work processes, which should result in a more effective company. All the employees share the same information and their workflow have enhanced to perfection. Why it’s even possible to state this is, first of all in theory and secondly due to the fact that there is very high variety of systems. So if the management have a clear view of what their company's business goals are, they just need to find a system that are align with that goal.

The general idea I get from the interviews and the literature is that a lot of companies alienate their IT-department away from the rest of the company. Top management don’t include them in important meetings where they have a chance to apply their knowledge and the employees see them as IT-janitors who will help them if, for example, their mail doesn’t work. It affects the IT-departments in many ways and one perspective of that could be the budget, when they can’t speak for themselves, which of course also have an effect on how much they can make the whole company more involved with IT. It gives the IT department a budget where they can’t include everything they need and in some cases are bound to fail when they already know that the system will exclude some essential features. This doesn’t make the staff from the IT-department very excited, which makes it harder to find any solid arguments for the sell pitch. This, both IT-Manager and Senior argues to be very important. If there is no passionate person that implements this new system, the employees will only see that they shift from one system to another with small changes in the looks, and with no good explanation of what the company is doing makes it even harder to understand why they should shift in the first place. This creates a frustration and anything new that doesn’t unburden the employee will be seen as even a heavier work process – even though they do the exact same thing and writes the exact same sentences.
Most of the problems that could occur in this very moment are if the IT-department creates a system without any input or feedback from the employees. This would still be a great system, but they might not see all problems that the salesman deals with on a daily basis. What do they really need? They are the ones that are going to use this new system in a greater extent, so why not involve them from the start. The first step of the implementation-phase in “the travel firm”, they had workshops for their employees to educate them in this new system and the employees had a chance to give feedback and ask questions about this new system. If the employees’ leaves feedback and they notice that they are taken seriously, or as IT-Manager said in the end; take their concerns seriously and they will feel that are involved in the creation of the system and will be more interested in using it.

To conclude, one of the greater resources and risk factors are the personnel. But, as mentioned earlier there is also another non-static resource; the customer. The customer controls the basic approach of the market and the initial standpoints for the system. What is the main customer and how can we reach this market in the most sufficient and efficient way possible? As said in the “Pros and Cons” section, the relationship between the company and the customer are strengthened and will lead to a higher loyalty amongst the customers towards the company.

As we can see in figure 3 (“Strategic; operational and analytical CRM”) the customer would work as a measurement for the value on the organization. It’s very to say that “without the customer, no income”, and the general idea that I got from this thesis is that a some companies really understands this, meanwhile a few companies blindly lock themselves to the thought that they need to focus on the organizations infrastructure and doesn’t really see that the new infrastructure will have some effect on the organizational structure which will change the workflow and the work processes. That’s why some organizations also fail, when they can’t see how important the relationships are between the customer and the organization. If the employees are insecure within the company, due to a too advanced system that they can’t understand or a faulty system, it will reflect to the customer, which in turn won’t feel secure to use the help they get.

‘Customer in focus’ are something that are well discussed throughout this complete thesis and a company that was very successful with this was dell computer. They understood that the combination of having the customer in focus and to have competent staff would result in a good relationship. Conclusions that have been made so far, from the articles and the interviews, have been including the fact; to know exactly who the right customer are - to be able to customize the product or service for its needs and be successful within that specific market.

What earlier stated in the “most recurrent issues”, was also performance metric and company communication. Communication within the organization was shown in figure 1 (“CRM as a series of relationships”), where Ryals and Knox (2001) argues that a good relationship within the company could be achieved through an implementation of a cross-functional standard. There is not much to add to that, except that I think in general that there could be some sort of pride within each department which makes them less interested to split all the information they have with all other departments. Hall (1997) argued that all departments can’t see their own place within the new system and on what level it would help the other departments. His example was that most of the departments see the customer...
handling as part of the sales or marketing functions. This is a good example of the need to have a high focus on the employees when there is a new system that are implemented to the company. Make them fully aware of what role they play and how the outcome will change with this new system. Once again, give them some concrete examples on how much more efficient the organization will get and what more features they can provide with this new system.

What can be said of performance metrics is that it is unique for each new system; it’s very hard to know in advance, and that it can’t be evaluated until after its implementation. With the last statement, it goes outside of the frame of this thesis but what I personally think is that there should at least be some thought put into this matter. Whatever change there is to an organization, it will be invalid if there is no measurement of performance. It can feel good and everyone is happy about the changes, but it could turn out to be a loss for the organization in terms of income. Due to the duality of what should be measured and how, the focus will lie on visible losses – but if there is a focus on how the employees ‘feels’ about their work space, and they are happy about the new changes, the loss in income will be seen as an investment in the personnel and there would be a positive result. So, to conclude the measurement – I think personally that it wouldn’t be a problem to measure performance, due to the fact that there are no implementations just out from the blue. Just as said earlier, if there was an initial thought of what the system should do to and with the company – there should already there be a framework of what a successful implementation would achieve.

In my personal opinion, the most of the recurrent issues, however big it is, could be traced back to the employees. Either that there should be a higher focus on the ones that are going to use the system the most, or the cross-functional part and work on the relation between the departments, or the relation between the workers and the management. The most important aspect of this is gaining stronger relationships within the company and make everyone feel confident, which will reflect out to the customers and if the employees can’t help the customer with the collected data, they could always ask the department directly without feeling that they giving them more power or that it would suppress their pride.

5.1 Conclusion
Of the most recurrent issues, I would like to say that the biggest issue would be the employees. That there needs to be a higher focus on the employees when there will be an implementation of a system of CRM. What should be mentioned is, this thesis have been concentrating on the implementation-phase, which doesn’t mean that there should be as high focus on the employees continuously after the implementation or that the management of the company should increase or decrease after a certain amount of time.

With this said, there is a lot of research to be done in this matter. This thesis has merely stated that there should be a high focus on the employees. But how, in the most efficient way, could there be a focus on the employees in the implementation-phase? Is it an unique way to handle this issue in each unique implementation or could there be a standard of what it should include/exclude in each implementation.
References


Appendix

(1) Interview with “the travel firm”
Denna intervju är en del av en Magisteruppsats där fokus ligger vid Customer Relationship Management (CRM) och varför man väljer att implementera samt själva uppföljningen. Syftet till detta är att få en tydlig överblick om vad man bör tänka på för att senare exempelvis kunna skapa en lättföljd checklista som bygger på problem som har uppstått vid tidigare implementationer för andra företag. Förutom en checklista så är förhoppningen att det även ska ge ett ögonblick åt reflektion och intresse för att fördjupa sig i både hur brett och djupt man kan låta sitt system för CRM ska få involveras i företagets infrastruktur. Nedan kommer tio frågor som förhoppningsvis kommer att täcka de problem som tidigare uppstått;

Skulle ni vilja vara anonym vid användning av denna intervju?

Vad har ni för roll/titel på företaget?

Vad är er arbetsuppgift?

Ert företag är mitt i ett införskaffande av ett system för CRM, hur mycket vet du om detta?

- Hur kommer det att påverka dig och din arbetsuppgift?

Har ni fått gå någon speciel utbildning inför införskaffandet?

Hur ser du på införskaffandet av systemet?

Hur ser de anställda på införskaffandet av systemet?

Finns det något forum dit de anställda kan vända sig till om de skulle ha frågor eller svårigheter med det nya systemet?

Okej, om vi ska se ur företagets synvinkel;

Vad hoppas ni uppnå med det nya systemet?

Kommer ni behöva att köpa in mer teknisk utrustning för att kunna arbeta med det nya systemet?

Hur ser ni på uppdatering av systemet?

Hur ser ni på vidareutbildning av de anställda?

Har ni någon uppfattning om vad era konkurrenter använder?

Tror ni att ert system kommer att ge er fördel mot era konkurrenter?

För att gå tillbaka till er;

Tror du att införskaffningen kommer att påverka er sammanhållning mellan avdelningarna?

Finns det någon speciel funktion som ni ser fram mot att kunna använda?

Tusen tack för ni ställde upp för en intervju!
(2) Interview with “the travel firm”, English translation

- What is your position within the company?
- What is your job assignment?
- Your company is in middle of adopting a system of CRM, how much do you know about this?
- What effect will this new system of CRM have on your job assignment?
- Did you go through any specific education before the implementation of the system?
- What is your view of the implementation of the system?
- What is the general view of the implementation of the system from the employees?
- Is there any platform or forum of data where the employees can turn to if there would be any difficulties?
- What do you hope to accomplish with this new system?
- Did you need to get some new technical artifacts to be able to work with this new system?
- What is the view on updates of the system?
- What is the view on further education of the personnel?
- Do you have a general perception of you competitors system that they use?
- Do you think your system will give any advantage over you competitors?
- Do you think the system will have any effect on the cohesiveness between the sections within the company?
- Is there a special function which you are looking forward to use?