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Customer Relationship Management Software Implementation in SMEs

Case Vitrea Ltd.

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Abstract

Successful customer relationship management (CRM) software adoption has many significant benefits to a company. Among the benefits are possibility to target the most profitable customers, therefore maximizing company's profitability, as well as efficient allocation of resources and superior customer service. However, many CRM implementations are unsuccessful. There are many reasons for that, among which can be inadequate planning or unreasonable expectations. Therefore, it is important to study the factors that affect the successfulness of CRM software implementation. Moreover, CRM software is recently, increasingly adopted by SMEs and is not only the privilege of large enterprises these days. The specific attributes of SMEs, such as being heavily centered around management, low in-house IT skills and scarcity of resources mean that the CRM implementation within SMEs need to be approached differently from CRM implementations in large enterprises.

The objective of this thesis is to identify the critical success factors (CSF) of CRM software implementation in SMEs. It does so, by reviewing the current literature and combining a theoretical framework for a case study of a company that has recently implemented a CRM software.

The CRM software adoption process is described in the thesis to have three separate phases: Decision to adopt, software selection and software implementation. After a company decides to adopt a CRM software, it needs to select the right software, to fulfill the needs of the company, and implement the software. This thesis is primarily focused on the software implementation phase of the process but software selection is very closely related to the software implementation, therefore software selection is also included to some extent in the thesis. Moreover, some of the identified critical success factors of CRM software implementation, presented in the thesis are directly or indirectly related to software selection.

From the literature review, six critical success factors are identified. These factors are management support and involvement, system compatibility, involvement of end users, determination of requirements, solidifying working practices and external assistance.

In this thesis, the implementation of CRM software is studied through a real business case. The case company has implemented a CRM software one and a half years ago, and the implementation has been successful to some extent but there are some aspects in the system that are not entirely used the way, they were originally intended to be used. The study tries to identify the reasons for this and gain insight on the principles of successful implementation of CRM software within SMEs.

The case study highlights the importance of user training as a factor, critical to the success of CRM software implementation, therefore user training is added to the list of critical success factors of CRM software implementation in SMEs. Furthermore, user training is mentioned in the literature review as part of end user involvement but these two factors are independent of each other as end users can be involved in the implementation without adequate user training and vice versa.

Keywords CRM software, IT, Implementation, SMEs, Software selection, User training

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Tiivistelmä

Onnistuneella asiakkuudenhallintajärjestelmän käyttöönotolla on monia selkeitä hyötyjä yritykselle. Näitä hyötyjä ovat mm. yrityksen tuottavuuden maksimointi, tuottavien asiakkaiden kohdentamisen kautta, resurssien tehokas kohdentaminen sekä paremman asiakaspalvelun mahdollistaminen. Monet käyttöönotot eivät kuitenkaan ole onnistuneita. Syitä tähän voi olla monia mm. riittämätön suunnittelutyö tai epärealistiset odotukset. Sen vuoksi, on tärkeää tutkia niitä tekijöitä jotka vaikuttavat käyttöönoton onnistumiseen.

Nykyään, pienet yritykset ottavat yhä enemmän käyttöön asiakkuudenhallintajärjestelmiä eikä ne ole enää vain isojen yritysten etuoikeus. PK-yritysten ominaisuudet, kuten yritysten keskittyminen johdon ympärille, matala IT osaaminen sekä resurssien niukkuus tarkoittavat, että asiakkuudenhallintajärjestelmien käyttöönotto PK-yrityksissä eroaa suuremmista yhtiöistä.

Tämän työn tarkoitus on löytää ne kriittiset menestystekijät jotka vaikuttavat asiakkuudenhallintajärjestelmän käyttöönottoon PK-yrityksissä. Tämä tehdään, kattavalla kirjallisuuskatsauksella, josta saadaan teoreettinen viitekehys case-tutkimukseen. Case-tutkimuksen yritys on hiljattain ottanut asiakkuudenhallintajärjestelmän käyttöönsä.

Asiakkuudenhallintajärjestelmän omaksumisprosessi kuvataan työssä kolmiosaiseksi: Päätös ottaa järjestelmä käyttöön, järjestelmän valinta sekä järjestelmän varsinainen käyttöönotto. Tämä työ keskittyy erityisesti varsinaiseen käyttöönottovaiheeseen mutta järjestelmän valinta vaikuttaa olennaisesti käyttöönottoon, joten järjestelmän valintaa ei voida sivuuttaa. Osa käyttöönoton kriittisistä menestystekijöistä liittyvätkin suorasti tai epäsuorasti järjestelmän valintaan.

Kirjallisuuskatsauksesta tunnistettiin kuusi kriittistä menestystekijää. Nämä ovat: Johdon tuki ja osallistuminen, järjestelmän sopivuus, loppukäyttäjien osallistuminen, vaatimusten määrittely, työskentelytapojen vakiinnuttaminen sekä ulkopuolinen tuki.

Työssä käyttöönottoa tutkitaan oikean yrityksen avulla. Yritys on ottanut asiakkuudenhallintajärjestelmän käyttöönsä puolitoista vuotta sitten ja käyttöönotto on ollut osittain onnistunut mutta joitain asioita ei ole saatu toimimaan aivan halutulla tavalla. Tämä työ tutkii tekijöitä jotka ovat vaikuttaneet tähän sekä sitä kautta pyrkii valottamaan yleisiä asiakkuudenhallintajärjestelmän käyttöönottoon liittyviä menestystekijöitä PK-yrityksissä.

Case-tutkimus tuo esille käyttökoulutuksen vaikutuksen kriittisenä menestystekijänä PK-yritysten asiakkuudenhallintajärjestelmien käyttöönotossa. Näin ollen käyttökoulutus lisätään kriittisten menestystekijöiden listaan. Käyttökoulutus on mainittu myös kirjallisuuskatsauksessa osana loppukäyttäjän osallistumista mutta koska nämä kaksi tekijää ovat toisistaan riippumattomia on mielekästä eritellä ne omiksi tekijöikseen.

Avainsanat Asiakkuudenhallintajärjestelmä, Informaatioteknologia, käyttöönotto, PK-yritykset, Järjestelmän valinta, Käyttökoulutus

Table of Contents

1	Introduction.....	1
1.1	Research question and objectives.....	2
1.2	Methodology.....	3
1.3	Structure.....	4
1.4	Terminology	5
2	Literature Review	7
2.1	The benefits of CRM software adoption.....	9
2.2	The characteristics of SMEs in IT adoption and implementation	11
2.3	Selecting the CRM software	13
2.4	Challenges of CRM software implementation	16
2.5	Critical success factors for CRM implementation in SMEs	18
2.5.1	Management support and involvement	19
2.5.2	System Compatibility.....	20
2.5.3	Involvement of end users	21
2.5.4	Determination of requirements.....	21
2.5.5	Solidifying working practices	22
2.5.6	External Assistance	22
3	Case Vitrea Ltd.	24
3.1	Methods	25
3.2	Background information about the company	26
3.3	The goals and expectations of the CRM system.....	28
3.3.1	The goals and expectations of the CRM system	28
3.3.2	How the goals and expectations have been met.....	28
3.4	The software selection	38
3.4.1	The important CRM system attributes for Vitrea ltd.	38
3.4.2	How have the important attributes been met.....	39
3.5	The implementation phase	43
3.5.1	Management support and involvement	44
3.5.2	System compatibility.....	45
3.5.3	Involvement of end users	47
3.5.4	Determination of requirements.....	50
3.5.5	Solidifying working practices	50
3.5.6	External assistance	54

4	Discussion.....	57
4.1	The successfulness of the CRM software implementation and the software selection in the case company	57
4.1.1	Software selection	57
4.1.2	Implementation	58
4.1.3	Evaluating the requirements, set by the company	60
4.2	Critical success factors of CRM implementation in the case company	61
4.3	Revisiting the research objectives	64
5	Conclusions.....	67
	References.....	70
	Interviews.....	73
	Appendices.....	74

List of Figures

Figure 1 - CRM adoption process by Ko et al. (2008).....	7
Figure 2 - CRM software adoption process	8
Figure 3 - Hierarchical structure for CRM software selection by Lee et al. (2014)	16
Figure 4 – CRM software adoption process	69

List of Tables

Table 1 - Critical Success Factors of CRM Implementation	19
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1 Introduction

There are many ways to define customer relationship management. Some organizations consider CRM as only a technological solution while some consider it as a strategy where the customer relationships are at center (Chen & Popovich, 2003). (CRM); Pan and Lee (2003) characterize it as a strategy that provides integration between all of the business areas, such as marketing, sales, customer service and field support, that affect the customer, through integration of people, process and technology. Similarly, Chen and Popovich (2003) see CRM as a cross-functional, customer-driven, technology-integrated business process management strategy that allows the company to maximize profitable relationships as well as guide the entire organization. This thesis relates to the definitions of Chen and Popovich (2003) as well as Pan and Lee (2003) and considers CRM as strategic management of relationships between a company and its customers.

These days, companies can utilize different kinds of software applications from the basic e-mail applications to more complex CRM and enterprise system applications in order to help them practice their businesses more effectively (Adebanjo, 2003). There are countless different CRM software available and each have their own attributes, but the basic idea behind any CRM software is to gather relevant customer information in one database (Adebanjo, 2008).

There are many benefits recognized for successful implementation of CRM software. With the help of such software, companies can transform basic data and turn it in to useful metrics in order for them to analyze their customers more thoroughly and understand their life-time value (Mazurencu et al., 2007). CRM software also enables the salespeople to be more effective by increasing their return on time invested in sales activities as they can identify the high revenue, high profit and high potential customers from the customer base (Raman et al. 2006). The CRM software can also enhance the customer service level, and therefore lead to better customer retention which can further lead to increased profit for the company (Harrigan et al. 2008; Mazurencu et al., 2007). Lee, Tang and Sugumaran (2014, p.3) state: “Nowadays, CRM software is not an option, but a necessary and integral part of any modern business that seeks to maximize revenue and continue growing as a business”.

A company that is about to adopt a CRM software finds itself in a situation where it needs to think of many factors, before beginning the actual implementation process, such as what are

the goals that the CRM software should fulfill as well as figuring out which software to implement. Although each CRM software implementation is different based on the company and its industry, size, resources, etc. there are factors that are common in successful information technology implementations (Adebanjo, 2008).

This thesis examines the implementation process of CRM software from the perspective of SMEs (small and medium-sized enterprises). Moreover, the focus is on the software selection and the factors relating to successful implementation of the CRM software. There are many distinct factors that make the information technology (IT) implementation in SMEs differ from larger enterprises, such as limited financial resources, low in-house IT skill and substantial top management involvement (Bruque & Moyano, 2007; Ghobakhloo et al. 2012). Nowadays it is not only the privilege of large companies to be able to utilize information technology as the implementation costs of software and hardware have decreased considerably over the recent years. Because of that, these days, SMEs do not perceive the costs so much as a hindering factor in IT adoption (Ghobakhloo et al., 2012).

In this study, the implementation of CRM software is examined through a real business case. The case company has implemented a CRM software one and a half years ago and the implementation has been successful to some extent but there are some aspects in the system that are not entirely used the way, they were originally intended to be used. The study tries to identify the reasons for this and gain insight on the principles of successful implementation of CRM software within SMEs.

1.1 Research question and objectives

The main objective of this thesis is to find out the defining factors that are essential in successful CRM software implementation from the SME perspective. The thesis provides a theoretical framework conducted from extensive review of the current literature on the subject. The theoretical framework is then juxtaposed to the business case in order to see how well it applies to a real business case.

Based on the objective of the study, the research question is:

“What are the critical success factors in CRM software implementation in SMEs?”

The case study is conducted from ex post perspective as the implementation has already taken place one and a half years ago. At this moment it is a good time to evaluate the

successfulness of the CRM software implementation of the case company as there has been some time to experience the software in action but still the implementation is fresh in memory within the company. This evaluation should offer good insight on the subject of CRM implementation within SMEs. Furthermore, it is important to identify the different aspects of the implementation and learn the reasons why some of the aspects may not have been implemented completely successfully. By evaluating a real CRM software implementation in a small company and assessing the different aspects of it, it is possible to gain better understanding about the factors, that are important to a successful implementation, or on the other hand, things that should be avoided.

Furthermore, Ghobakhloo, Hong, Sabouri and Zulkifli (2012) define IT implementation as the subsequent phase to decision to adopt IT. In other words, first, a company decides to invest in a specific technology, for example, CRM software, after which it needs to decide on the exact software, it wants to implement and then the company implements the selected software (Ghobakhloo et al. 2012). Even though the thesis makes some remarks about the decision to adopt IT, and more specifically CRM systems, the focus is on the software selection and on the implementation phase of the adoption process.

To answer the research question, more specific research objectives can be named:

1. *Describe the critical success factors of CRM software implementation in SMEs based on the current academic literature.*
2. *Evaluate the successfulness of the CRM software implementation in the case company*
3. *Describe the factors that have been affecting the successfulness of the CRM implementation in the case company.*

1.2 Methodology

This section describes the methodology through which the thesis is conducted in order to answer the research question. The thesis includes an exhaustive literature review that introduces the reader with current academic literature on the topic as well as constructs a theoretical framework for CRM software implementation within SMEs. Additionally, a case study is included, through which the theoretical framework can be assessed in a real business case. The case study aims to provide a deeper understanding towards the critical factors that

should be considered when implementing CRM software within SMEs as well as bring out any factors that should be avoided during the implementation of the software.

There is sufficient amount of literature on IT implementation, however most of the academic literature is focused on the bigger companies (Ghobakhloo et al. 2012). This literature is not directly applicable to IT implementation in SMEs. Therefore, as the thesis is focused on the SMEs, it is important also to identify the characteristics of SMEs in IT implementation and create a theoretical framework that reflects the traits that are possessed by the SMEs.

Additionally, most of the academic literature, that addresses IT implementation, is focused on enterprise resource planning (ERP) system implementation. However, there are many similarities in CRM and ERP system implementations, which means that it can be used to some extent also for this study (Maleki & Anand, 2008).

The case study is conducted by analyzing the current situation within the company regarding the CRM usage and more importantly, identifying any factors that would be critical in a successful CRM software implementation in SMEs or factors that should be avoided regarding the implementation. The study is conducted by semi-structured interviews with the management as well as the salespeople of the company.

The data received from the interviews will be analyzed in order to try and find any occurring themes that would explain the dos and don'ts when it comes to CRM implementation in SMEs. The theoretical framework will serve as part of the frame for the interviews and the results from the case study are juxtaposed to the success factors identified from the literature. This is a good opportunity to see how the theory from academic literature transfers into a real business case. Furthermore, the aim is to create useful guidelines for any SME when implementing a CRM system, by combining academic literature and a real business case.

1.3 Structure

The structure of the thesis is following, after the introduction, the second section of the thesis is the literature review. The literature review begins by explaining the CRM software adoption process and the different phases of it. Next, the benefits of CRM software adoption are reviewed. After that, the characteristics of SMEs are described. Following that, the software selection is discussed after which the challenges of implementation are described. Finally, the

critical success factors of CRM software implementation in SMEs as per the current literature are presented. These critical success factors will provide the theoretical framework of the thesis.

Section three presents the case study. This section begins by explaining the methods that were used to conduct the case study. Following is background information about the case company and the case itself. After that, the successfulness of the implementation is evaluated by studying how well the goals and expectations set by the company have been met. After that, the successfulness of the software selection is similarly evaluated. Finally, the factors that have been critical in the successfulness of the CRM software implementation in the case company are studied.

Following the case, is section four where the findings of the case study and thesis are discussed. The successfulness of the implementation in the case company is further discussed followed by discussion about the factors that have been critical in the case company implementation. This section ends by revisiting the research objectives of the thesis.

Finally, section five concludes the thesis by presenting the key findings regarding the research question and the contributions of the thesis.

1.4 Terminology

Below is a list of key terminology used in this thesis

Bespoke application	Software that is tailor made for the customer
Critical success factor (CSF)	Factor that is critical in order for something to be successful
Customer relationship management (CRM)	Strategic management of relationships between a company and its customers
DM	Development manager
E-CRM	Electronic CRM concerns all forms of managing relationships with customers making use of IT

Enterprise resource planning (ERP) Business process management software

Information technology (IT) The use of systems for storing, retrieving and sending information

Off the shelf application Software that is available for purchase by general public

Open source software Software with open source code. It can be freely modified

Proprietary application Software that is owned by an individual or a company. Major use restrictions

SMEs Small and medium enterprises

2 Literature Review

The objective of this section is to review the current academic literature concerning the implementation process of CRM systems especially from the viewpoint of small and medium-sized enterprises and create a theoretical framework based on it. The main focus of the thesis is on the actual implementation phase but there are a lot of different factors that relate to that. Before a company can implement a CRM software it needs to select one to be implemented. CRM software adoption can be seen successful when the implemented software is being used within a company. Furthermore, the successfulness of CRM software selection and implementation processes are essential parts of CRM software adoption.

Ko, Kim, Kim and Woo (2008) divide the CRM software adoption process into three phases. The first phase of the process is perception of CRM software. The perception of CRM software, as seen by the decision makers in a company, needs to be positive. The perception of CRM can be a result of numerous factors. Some may perceive CRM software positively because other companies have adopted it or they have seen a commercial of a CRM software. Moreover, the more positive the image of CRM software is in the minds of the decision makers and the clearer they can see the benefits of it, the more likely it is for a company to move on to the second phase of the process, which is the decision to adopt CRM software for the company. As the decision to adopt a CRM software is made, the company will begin to look the suitable technology or software for their purposes. The third and final phase in the CRM adoption process by Ko, Kim, Kim and Woo (2008) is the CRM software implementation.



Figure 1 - CRM adoption process by Ko et al. (2008)

The thesis and the literature review will discuss some of the factors of decision to adopt CRM software but the focus is on the software selection as well as the implementation phase

and what are the success factors and pitfalls in that. In this study, the CRM software adoption process is regarded to have three distinct phases. The first phase is the decision to adopt a CRM software. The second phase is the software selection phase and the third phase is the implementation of the CRM software. See picture 2.

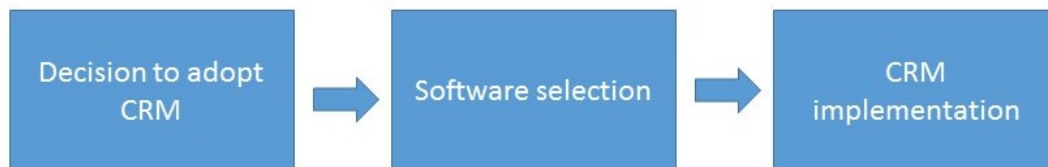


Figure 2 - CRM software adoption process

This chapter continues by introducing the benefits that CRM software adoption and implementation can have for a company. These are the major drivers for companies to make a decision to adopt a CRM software. Moreover, the drivers for the decision makers to begin the CRM software adoption process. After the benefits of the CRM software adoption are covered, the next section describes the distinct characteristics of SMEs in IT and especially CRM software adoption and implementation. The section after that discusses some of the main guidelines for software selection for different types of companies. The software selection chapter will not dig too deeply into detail as it is extremely difficult to generate specific rules on what kind of a software any given company should implement but it will provide basic guidelines and useful information for what each company should contemplate upon the software selection and provides some methods that can be helpful in the right CRM software selection. The next section discusses different reasons for unsuccessful CRM software implementations. These are things that any company, that is looking to implement a CRM software in the near future should consider as by being aware of the possible pitfalls, the chances of avoiding them will significantly increase. The last section of the literature review presents the critical success factors for CRM software implementation. The critical success factors of CRM software implementation should be considered before beginning the implementation process as by neglecting these factors, the implementation is less likely to be successful. The theoretical framework for the empirical part of the thesis is conducted from the critical success factors discovered from the current academic literature.

2.1 The benefits of CRM software adoption

“Nowadays, CRM software is not an option, but a necessary and integral part of any modern business that seeks to maximize revenue and continue growing as a business” as Lee, Tang and Sugumaran (2014, p.3) state about the importance of CRM software. According to them, by integrating all the sales, current customer, associated company and employee data, the CRM systems enable companies to seamlessly take care of marketing, sales and customer service as a single package. They suggest that the CRM software supports different business processes and keep the customer data timely. By analyzing the data, that the systems conveniently organize, the companies can make better strategic sales and marketing decisions (Lee et al. 2014).

Ou and Banerjee (2009) state that past research has identified one of the key components in a competitive business strategy to be, the ability to satisfy customers’ needs and the way to do that is by analyzing customer information. Customer relationship management is among the fastest growing management approaches and more and more companies are adopting that approach as their way of doing business (Adebanjo, 2003). Nowadays there are a lot of different CRM software offered for companies to help them in managing their customer relationships more efficiently. Gathering customer information and storing it conveniently so that it is available for the employees to use when they need it is essentially what the different CRM software are built for.

Dibrell, Davis and Craig (2008) state that: “IT does have a positive and significant effect on current profitability and future growth.” They suggest that one of the reasons for that is, that there has been an increase in managerial sophistication of IT usage. Furthermore, according to them, managers have increased their knowledge and understanding of the most effective ways to integrate the company’s strategies with IT and that firms are able to create unique resources and capabilities through the use of IT.

There are a lot of benefits recognized for successful implementation of CRM software. Mazurencu, Mihaescu and Niculescu-Aron (2007) state that with the help of information technology, companies can transform the basic data and turn it in to useful metrics in order for them to analyze their customers more thoroughly and understand their life-time value. This will allow companies to maximize profitability through better targeting of the important customer segments and can lead to better retention of important customers, which can further lead to significant improvement in life-time value (Mazurencu et al., 2007). Harrigan, Ramsey

and Ibbotson (2008) have also recognized the possibility for IT to be able to calculate the most profitable customers to whom the company can then allocate resources in order to retain them. This obviously also works the other way around, so that the company can see the customers it should not allocate its limited resources to. Therefore, managing integrated information is essential to successful CRM (Harrigan et al., 2008).

Another benefit from managing information is the possibility for companies to personalize their offerings according to the customer needs as well as to predict future behavior. This enhances the customer service level, and therefore can lead to better customer retention which should further lead to increased profit for the company (Harrigan et al. 2008; Mazurencu et al., 2007).

Companies that use e-CRM find themselves having to spend less amount of money on promotion but still maintain customer retention due to the fact that they are able to target their promotions better than the companies that don't use such systems (Chaston & Mangles, 2003). Better knowledge of their customers will result in less financial resources going to waste, which leads to increased profitability (Harrigan et al., 2008).

Harrigan, Ramsey and Ibbotson (2008) state that a company using e-CRM systems can be more efficient in information capture and management, and therefore achieve better levels of customer service than the ones using traditional, non-internet based CRM systems. The value from e-CRM comes from lowered costs, better practices, as well as creating competitive advantage which is the essential reason for IT adoption (Ghobakhloo et al., 2012; Harrigan et al., 2008).

Adebanjo (2008) also recognizes four distinct benefits that are achievable through CRM software. First is the improvement in processes that can be reached through the gathering and use of information from the customers. Second are the lowered costs through more accurate usage of resources, including also human resources. The third being improvement in the customer perception of the business leading from better interface, speedy service as well as improved traceability. The fourth possible benefit is the remarkable potential for increased sales as the response time to customer requirements is faster, the product and customer information is more mobile and the allocation of resources at customer retention and recruitment is improved. The literature clearly recognizes the potential that IT has in improving the customer service level and satisfaction leading to better customer retention and lower costs. Therefore, successful implementation of CRM software is likely to be profitable for companies.

The benefits are multiple from successful CRM system implementation but the degree to which they are successful is not as high as it should be. A report by Gartner group stated that about 55 percent of all CRM projects are failures (Loh et al. 2011). Earley (2002) stated that up to 75 or 85 percent of the CRM implementations can be considered failures. Therefore, it is beneficial to study the factors that can help a company to be successful in CRM system implementation.

2.2 The characteristics of SMEs in IT adoption and implementation

SMEs differ from large companies in the adoption process of information technology (IT) by their specific characteristics such as the lack of resources, meaning they have fewer people and less money among other resources, compared to larger companies (Ghobakhloo et al., 2012). SMEs are also usually very centered around the management (Bruque & Moyano 2007). This is an important factor as the management plays a significant role in all of the decisions that are made within SMEs, and CRM software implementation is not different in that perspective. Therefore, it is vital for management to be supportive and involved in the IT adoption and implementation process.

Furthermore, SMEs usually face the challenge of having restricted access to resources compared to larger organizations. Especially the lack of financial resources and in-house IT knowledge are factors that can hinder the adoption of such software in SMEs (Ghobakhloo et al., 2012). The scarcity of financial resources may lead to companies being cautious about their investments and spending (ibid.). It is clear that SMEs are careful with what they invest in as an implementation failure can have significant financial consequences (ibid; Loh et al., 2011). Ghobakhloo, Hong, Sabouri and Zulkifli (2012), however, state that the costs of software and hardware have been decreasing, making it possible also for companies with fewer financial resources to be able to implement sophisticated IT systems.

As mentioned, the absence of in-house technological skill can be seen as a factor hindering the adoption of CRM systems as it may influence the mindset of the management in a way that they feel as IT is not necessary in their business (Nguyen, 2009; Loh et al. 2011; Ghobakhloo et al., 2012). Adebanjo (2008) also recognizes the lack of internal resources as one of the issues in adopting a CRM software in SMEs, as because of that the companies may not really understand how the software impacts the company.

Bruque and Moyano (2007) suggest that the standard procedures within SMEs are usually not well laid out and that SMEs have limited long-term planning compared to the larger enterprises. That along with the other mentioned factors have an effect on the adoption of IT in SMEs. (Broque & Moyano 2007).

Loh, Koo, Ho and Idrus (2011) state that there are various reasons for SMEs to shy away from adopting CRM software. Firstly, SMEs are afraid to make investments into expensive hardware and software. Secondly, the SMEs typically tend to have lower IT understanding within the company, which leads to them not knowing how to cost-effectively implement such a software. Because of these factors, the companies could face a significant loss to them as CRM systems help companies in retaining customers as well as in expanding their customer base and become more competitive in the challenging business world (*ibid.*).

CRM software implementation has been the topic of a lot of research but a more recent stream is the one from the SME's point of view (Loh et al., 2011). As mentioned above, the costs of hardware and software have significantly decreased over the recent years which has made it possible for SMEs to adopt new IT for their benefit (Ghobakhloo et al., 2012). However, not only do the direct costs of hardware or software need to be considered when implementing new IT but also other costs that incur during the process. Love, Irani, Standing, Lin and Burn (2005) recognize indirect costs as being more significant than the direct costs as they can be seen as costs related to the transformation of the company from the previous work practices to the new ones. These kinds of costs may occur for example as temporary loss in productivity within the organization, as well as management's lost time when they need to focus on the IT project leaving less time for it to focus on other aspects of business. In particular, the indirect costs can be very hard to predict, which leads to uncertainty about the benefits of IT and therefore pose a hindering factor in the willingness to invest in IT for SMEs (Ghobakhloo et al., 2012). This is one of the many factors that SMEs should put a proper amount of consideration on before they decide on the implementation of IT. The better the company is prepared beforehand, the less surprises there will be in the implementation.

Alshawi, Missi and Irani (2011) state that SMEs differ from large enterprises mainly because of their limited resources, that affect their information-seeking practices and by the lack of having as many legacy systems as the larger companies do. Therefore, the CRM implementation process should be treated differently as with the large enterprises (Alshawi et al. 2011).

Most of the academic literature is unified when it comes to the distinctive features of SMEs in IT adoption and implementation. The SMEs are very much centered around the top management and it is crucial for most of the new innovations in SMEs to have the top management support in order to be successful. The scarcity of resources, such as financial and human, is another very distinctive feature of SMEs. The IT knowledge within SMEs tend to be diminutive. These days however, the hardware and the software costs have seen a decrease and it is finically feasible for SMEs also to implement new IT i.e. CRM software (Ghobakhloo et al. 2012). However, for SMEs it is important to not be blinded by the lowered software and hardware costs, as the indirect costs may be much more significant than the direct ones and much more difficult to realize beforehand (Love et al. 2005). Moreover, it is very important for SMEs, as well as any company, to plan the CRM software implementation very thoroughly before the beginning of the adoption as it will increase the chances of successful implementation and more effective usage of the scarce resources.

2.3 Selecting the CRM software

As the potential benefits of successful CRM software adoption are remarkable, it is important to reduce the risks that are involved in the adoption process of CRM software. One of the key factors in the process has been identified to be the selection of the right software (Adebanjo, 2008). It is clear that each company is its own separate unit with unique characteristics such as culture, resources, size and industry. Therefore, there is no single right software for all companies, but each need to figure out their needs and match the software accordingly. As there are vast numbers of different kinds of companies, as there are also numerous amounts of different software to choose from. The idea here is to discover some patterns that would apply to certain types of companies in order to be successful in the implementation (Ibid.).

Adebanjo (2008) studied three different cases of CRM software implementation in SMEs: one of the case companies implemented an off-the-shelf application, one chose a proprietary application and one deployed a bespoke CRM application. Each company was successful in their implementation to some extent, but each faced some problems with their chosen applications. As a result of the study, Adebanjo (2008) introduced a list of things to consider for SMEs before implementing CRM software:

- Determine the functional requirements of the system

- Involve the potential users of the system throughout the specification, development and deployment phases.
- Anticipate the future needs or possible changes in the processes of the company and make sure to involve them in the system design
- Decide if there is need for high-level IT skill in-house. This is especially important should there be future modifications to the system.
- Make sure the system is compatible with the required legacy IT applications.

Adebanjo (2008) also points out that companies with little resources, simple requirements and low level in-house IT skills can find the off-the-shelf packages a good choice. The costs of purchase and deployment are usually lowest with those kinds of systems.

Earley (2002) states that is very difficult for a company to gain enough knowledge of the current offering of CRM applications available in the market in order make a justified and smart decision. This is due to the substantial innovation and consolidation in the market that makes the vendor ecosystem continually shifting.

Moreover, the signals that a company can receive from different vendors and other sources about which CRM software might be just the best for a specific company may be confusing and distracting. This is why it is critical to begin the process by determining the functional and technological requirements of the system and then move on to seeking possible candidates to select from (Earley 2002). Earley (2002) suggests that a company should consider building a simple comparison matrix to determine the best CRM for their purposes. This could be done by selecting features and functions such as pricing, supported platforms and integration and then given a score to each of the attributes to represent how important that specific attribute is to the company. By doing so the company can then compare the CRM software candidates, according to the attributes in the matrix, and select the software with the highest score (ibid.).

Adebanjo (2003) identifies three perspectives from which the CRM software selection can be looked at. These perspectives are complexity, timeframe and configurability. In the study different CRM software are categorized by the complexity of the system, the time it takes to implement the system and the degree to which the software is configurable. Two ends of the CRM systems viewing from these perspectives are basic standalone CRM software that is of little complexity, requires little amount of time to implement and has little configurability. On

the other end of the spectrum there is bespoke CRM software that are very complex, require a lot of time to implement and are very configurable. By considering these perspectives, a company can get the idea of what type of CRM software it requires.

Lee, Tang and Sugumaran. (2014) suggest that the market for CRM software is starting to become stable along with the popularity of CRM software. According to them the CRM software market can be divided in two categories: First category includes large scale and proprietary software such as Microsoft Dynamics CRM, Oracle CRM and SAP CRM. The software that belong to the first category are mainly used by larger companies with strong financial capabilities. The second category of CRM software on the other hand is mainly designated for smaller companies and the main product among the second category is open source CRM software. Lee, Tang and Sugumaran (2014) further state that, along with the open source software trend, the CRM software is an extremely attractive alternative for companies, especially for SMEs. The open source CRM software are free or close to free when the standard edition is implemented. Should a company choose to use an advanced edition of the software or use an external consultancy for purchase and implementation, Lee et al (2014) state that it will still be much less expensive to go with open source CRM software than a proprietary CRM software.

Lee, Tang and Sugumaran (2014) in their study, suggest that the selection of the right open source software should be done by following multiple-criteria decision-making (MCDM) using the analytic hierarchy process (AHP). Lee, Tang and Sugumaran (2014) have created a hierarchical structure as a model for companies to use when using the AHP (See Figure 3.) Using an AHP is one prominent way companies can tackle the usually complex choice of which CRM software to select. This kind of decision making model is best suited to be used with a designated AHP software that will aid the users in creating hierarchical structures and assigning the correct weights on the different criteria and other aspects that need to be considered when using such model. This study will not go deeper into details with this specific decision making model as it is not the main subject of the thesis but it definitely is something that companies can look as an alternative for selecting the right CRM software for their company.

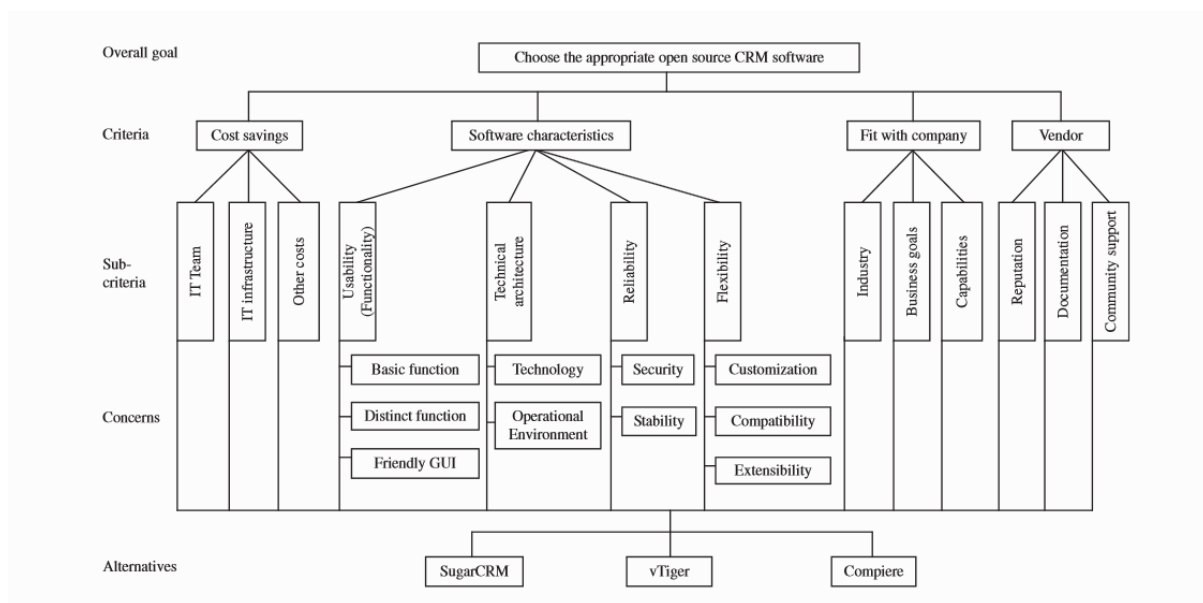


Figure 3 - Hierarchical structure for CRM software selection by Lee et al. (2014)

This section provided some important aspects that are essential for companies to consider as they are making the selection of what kind of CRM system is best for their purposes. Even though some very basic guidelines were introduced, the main finding within the selection process was that there is no single framework that could determine what type of system is best for what kind of company but it is always dependent on the situation and it is crucial that a company determines the requirements of the system they need and then move on to perusing different options.

2.4 Challenges of CRM software implementation

Despite the discovered benefits of IT adoption and the significant contributions that IT has made to business, many studies indicate that there are a large number of unsuccessful IT implementations in SMEs and that the adoption rate is very low (Nguyen 2009). Therefore, it is very important to recognize the usual challenges that may occur during an implementation process and prepare to face them before initiating the CRM system implementation.

Nguyen (2009) recognizes three major elements to unsuccessful CRM implementations in SMEs. Firstly, management is unclear as to how and why the company is adopting new IT. Secondly, the management may be unable to understand the actual relationship between the IT and the company or be unaware of the opportunities that IT may bring for the company.

Thirdly, the company is incapable to expand their IT resource. This can be because of lack of business and IT strategy, limited capital resources, emphasis on automating, influence of major customers and limited IT skills (Nguyen 2009).

Pan, Ryu and Baik (2007) suggest that there are two different levels in which the CRM software implementation can fail. Firstly, and more obviously, an implementation should be called a failure when the CRM system is used for less than six months. This situation can be considered to be a complete failure as all it does is wastes the company's scarce resources, that is, time and money. The other situation that can be considered a failure, although not as bad as the above mentioned, is when then CRM system does not meet the original requirements it was supposed to fulfil (ibid.)

Harrigan, Ramsey and Ibbotson (2011) suggest that one reason for unsuccessful implementation of CRM systems can be seen to reflect from general lack of strategy in SMEs, which would result in CRM systems being treated as short-term tactical projects rather than long-term integrated strategies. Furthermore, it is suspected that the adoption of IT is in some cases a result from outside pressure without fully understanding how and why it is done (Harrigan et al. 2011; Nguyen, 2009). Adebajo (2012) also states that one reason for unsuccessful IT adoption can result from inappropriate connection between the company's strategies and the adopted IT.

Earley (2002) simplifies two common reasons for unsuccessful implementation of CRM software: these are inadequate planning and unreasonable expectations. He also suggests that most CRM software implementations are done in a rush, which may result in failure. This is closely related to the inadequate planning of the implementation. Yet another factor mentioned in his article that causes failures in the implementations of CRM software is the complicated network of application vendors. It is difficult to gain sufficient knowledge of the CRM software offering as it is constantly changing as pointed out in the software selection section.

Moreover, Earley (2002) argues that the failure to implement CRM software can be considered something that is self-inflicted and that by streamlining internal processes before the implementation, the probability of successful CRM system implementation is significantly increased. In the next section critical success factors to CRM implementation from the SMEs point of view are provided.

2.5 Critical success factors for CRM implementation in SMEs

Critical success factors (CSFs) are factors that affect the successfulness of any given activity. Neglecting CSFs will lead to a drop in the performance (Niazi et al., 2006). In this case CSFs are factors that are important in the implementation process of CRM software from the viewpoint of SMEs. Neglecting these factors should have an impact to the successfulness of the CRM software implementation.

There have not been many academic studies for CRM software implementation from the SMEs perspective in the past as the focus has been more on the ERP and other IT software implementations. Additionally, the focus on these IT implementation studies usually is not from the point of view of SMEs (Ghobakhloo et al. 2012). There are some characteristics in SMEs that make the implementation of CRM software differ from the larger enterprises. Therefore, it would not be vice to assume that the critical success factors of CRM software implementation discovered for the larger enterprises directly worked for the SMEs.

This chapter presents the critical success factors of CRM implementation in SMEs as discovered from the academic literature. In the beginning, a table presents the critical success factors of CRM software implementation in SMEs. This works as a theoretical framework of the thesis. Following the table each of the factors are further described.

Table 1 - Critical Success Factors of CRM Implementation

CSF	References
Management Support and Involvement	Bruque & Moyano 2007; Croteau & Li 2003; Gobakhloo et al. 2012; Eid & El-Gohary 2014
System Compatibility	Adebanjo 2008; Earley 2002
Involvement of End Users	Adebanjo 2008; Ghobakhloo 2012; Jiang et al. 2000; Jomphe et al. 2013
Determination of Requirements	Adebanjo 2008; Earley 2002; Fui-Hoon Nah et al. 2001
Solidifying working practices	Earley 2002; Harrigan et al. 2011
External Assistance	Ghobakhloo 2012

2.5.1 Management support and involvement

Top management commitment to change and CRM software implementation has been found to be important in the successfulness of CRM software implementation. The support can be evidenced through committing resources for educating and training employees, assigning key employees throughout the implementation process, and for purchasing the required technology (Eid & El-Gohary 2014).

The role of CEO and management is especially crucial in the CRM software implementation process within SMEs as the companies are very much centered around the

management (Bruque & Moyano 2007). The managers need to be supportive towards the implementation and they should actively participate in the implementation process (Ghobakhloo et al., 2012). They need to be willing to provide the necessary resources and authority in order for the implementation to be successful.

2.5.2 System Compatibility

Data integration is also vital to successful CRM implementation, according to Earley (2002). This means that CRM systems alone do not create all the customer data, and important data from other systems need to be converted in to the CRM system. Thus, it is very important to make sure that the new CRM software is compatible with the current systems operating within the company. As CRM is implemented, the company does not stop using the legacy applications and it is crucial that all of the applications integrate with each other (Earley 2002). Adebajo (2008) also finds it vital to make sure that there is compatibility between the new system and legacy IT systems.

Earley (2002) states that companies need to be aware of the coming updates to their CRM software. The implementing company should consult with the vendor about the planned updates to the system and make sure that they are aware if the upcoming upgrades have an effect on the customizations to the system.

Moreover, the selection of the right CRM system for the purposes of the company is a crucial part in successful CRM implementation (Earley 2002). Benchmarking with companies that have gone through a similar implementation process can prove to be useful as they might provide insights into the situation and offer advice to how some of the steps should or should not be gone through (ibid.). System compatibility therefore here means not only the compatibility between the new system and the legacy systems but more the compatibility between the software and the desired outcomes from the system.

Software selection is discussed more in detail, in the *2.3 software selection* section previously.

2.5.3 Involvement of end users

Adebanjo (2008) states that involving users in the implementation process is beneficial for the implementing company and that the end users should be included throughout the adoption process from specification, development and deployment phases.

Jomphe, Plaisent, Pecquet and Bernard (2013) state that the successfulness of CRM software implementation is heavily dependent on the interest of the end users to accept the new system. Therefore, involving the end users from the early stages should be beneficial as it lessens the resistance of a new software implementation (Jiang et al. 2000).

Jiang, Muhanna and Klein (2000) further suggest that the end users may be reluctant to change to new customs and procedures, therefore it is important for companies to pay attention to the user training in order for them to realize the benefits of the new system.

2.5.4 Determination of requirements

Adebanjo (2008) suggests that determining the company's functional requirements of the CRM software is essential in the beginning of the implementation process. The determination of requirements is an essential part of the CRM software adoption and it should be done in the early stages of the process.

The determination of functional requirements of the CRM software is largely related to the software selection part of the adoption process but it is also important to determine the strategic goals and expectations of the implemented CRM software. Moreover, to determine what are the concrete benefits and expectations that the implemented CRM software should bring for the company (Fui-Hoon Nah et al. 2001).

It is clear, that in order to be able to go through the IT adoption process successfully, any company needs to have a vision of what it is exactly that the new IT will bring for the company and what kind of problems it should resolve. The overall expectations of a new IT system should be broken down to specific requirements, in order to firstly, select the software that fulfills the determined requirements of the system and secondly, to determine how well the implemented software has been able to fulfill the expectations set towards the system (Fui-Hoon Nah et al. 2001).

2.5.5 Solidifying working practices

Earley (2002) states that before the selection and implementation of CRM software it is important to solidify the working practices in the company concerning processes, procedures, and customer focuses, and to clarify how customer relationships are managed within the company. This includes understanding, modifying when necessary, documenting and applying desired business processes, procedures, rules and policies. This is the basis of the implementation and will have an effect to the success of the implementation.

Harrigan, Ramsey and Ibbotson (2011) suggests that even though benefits can be attained by treating the CRM system in a fashion that it is just a tool, utilizing it in a strategic way reaps greater benefits as well as produces fewer challenges. Furthermore, the CRM software is a tool that enables a strategic approach of effective and efficient management of customer relationships. This is also supported by Adebajo (2008) who suggests that a company needs to anticipate the future plans and needs and have them reflect to the system design that is to be implemented.

2.5.6 External Assistance

Ghobakhloo, Hong, Sabouri and Zulkifli (2012) state that it is crucial for SMEs to get external assistance in order to be successful in the implementation of IT because of the scarcity of in-house IT knowledge, skills and training resources. As the main source of external IT knowledge for SMEs Ghobakhloo, Hong, Sabouri and Zulkifli (2012) identify external consultants and application vendors. They also suggest that government can have an influence in IT adoption through some government initiatives or policies that may directly or indirectly help small companies with limited resources. However, the government aid has not usually been found useful in IT adoption except for some cases in developing countries (ibid.).

The level of IT skill within the users of the system can also be a factor in the successfulness of the implementation as it increases the satisfaction towards the implemented IT, as well as enhances the contributions they can provide throughout the different phases of the implementation process (Ghobakhloo et al. 2012). Therefore, Ghobakhloo, Hong, Sabouri and Zulkifli (2012) suggest that the IT skills and knowledge of the users should be improved. SMEs should also seek out IT knowledge within their networks, for example, from other organizations, suppliers or vendors to help them in the implementation of IT (ibid.).

Deciding whether it will be beneficial for a company to acquire high-level in-house IT skills are also emphasized by Adebajo (2008). Acquiring in-house IT skills might be especially useful in case there are future modifications to be done to the CRM software (ibid.).

Moreover, the degree to which the external assistance is required in a CRM software implementation is dependent on the existing level of IT capabilities within the company. Obviously, the more there is IT skill within the company the less it needs to rely on external assistance.

3 Case Vitrea Ltd.

The case study part of the thesis presents a real business case of a company, Vitrea Ltd. which has implemented a CRM system one and a half years ago. The company has implemented the CRM software successfully for the most parts and it is now fully running in the company. However, even though the implementation of the software has been appraised by many within the company, there are some issues that have occurred regarding the usage of the system. This case study will serve as a practical application of the theoretical framework gathered from academic literature in the previous sections of the thesis. The critical success factors of CRM implementation from the literature review will be used as a template in order to study these factors relating to successfulness of the implementation in an actual business case. The findings from the case study regarding the critical success factors will be juxtaposed with the factors from the literature in order to see how well the theoretical framework holds true in this specific case. The findings from the case study can also bring out new important factors that should be considered when implementing a CRM software.

The section will begin by introducing the study methods and is followed with a background introduction of the company as well as short description of the course of the implementation. After that, the case study will introduce the specific goals and expectations that the company had towards the system before the implementation and evaluates how successful the implementation has been by going through each of the expectations and their current state. By evaluating how well the expectations and goals set for the software have been realized, the successfulness of the implementation can be assessed

After that, the following section will describe the desired features of the CRM software as documented prior to implementation. The features are then assessed in order to find out how successful the software selection has been in the CRM software adoption process of the company.

After the successfulness of the implementation and software selection are reviewed. Following is the evaluation of the critical success factors of CRM software implementation in SMEs. By evaluating how well the company has succeeded in performing the critical success factors provided by the literature review, the theoretical framework can be evaluated. Another reason to do so is to find explanations towards the successfulness of the implementation. By assessing the CSFs in the implementation of the case company, it possible to find reasons for

either successful aspects of the implementation or unsuccessful aspects of the implementation. This is essential in order to be able to generate useful recommendations for the case company if possible as well as general information about the factors that are critical in the CRM software implementation process.

3.1 Methods

This chapter describes the methods that were used to study the successfulness of the implementation as well as the factors affecting it, within the case company. The main method used was semi-structured interviews that were held for most of the actors within the company that are involved with using and managing the CRM software. The study was conducted by using two separate interview frames where one is designed for interviews done especially for the management of the company and the other one, especially for the salespeople of the company.

The first interview frame is designed for the management of the company, including the CEO of the company and the development manager of the company and the aim of those interviews is specially to create a clear image of the current situation of the CRM software usage in the company. For example, what activities, should be input into the CRM software and by their opinion, how are the salespeople of the company performing in doing so. Moreover, this phase identifies what are the aspects of the CRM software that are running as intended and on the other hand what are the issues that belong to the CRM software usage within the company. The goals and expectations towards the CRM implementation have been documented prior to the beginning of the implementation two years ago and these goals and expectations are used as the basis for the interview. The aim is to go through each of the goal and expectation and see how well they have been materialized after the implementation of the CRM software. In addition, if there are any other interesting aspects about the current state of CRM software within the company, they will be tried to bring out.

In addition to the current state of CRM usage in the company, the interviews with the management focus on the desired CRM software attributes, that have been set before the implementation, and how well they have been met now that the software is implemented. Also, the different aspects of the implementation process are gone through with the help of the critical success factors found from the literature, in order to see how well they have been realized in an actual CRM software implementation and how important they have been. This should allow

to evaluate how critical the factors gained from the literature have been in this specific CRM implementation and its successfulness and also if there are any other factors regarding the CRM software implementation that would have been critical to the successfulness of it. Moreover, the aim is to understand the successfulness of the CRM software implementation in the company and try to identify any reasons for successful or unsuccessful CRM implementation in the company.

The second interview frame is focusing in on the salespeople’s point of view. Similarly, to the management interview frame, the focus is on the current state of CRM usage in the company and identifying any reasons that might have caused for some of the factors in the implementation to be successful or on the other hand unsuccessful. During this phase, the salespeople of the company are interviewed. For example, the salespeople’s attitudes toward the system are studied in order to see how well the actions, during the implementation phase, towards lowering the possible resistance have succeeded. By interviewing the management and the salespeople of the company, the study should be able to combine a comprehensive image of the current situation regarding the CRM software usage in the company and identify the reasons for the successfulness of the implementation or on the other hand the lack of success regarding specific aspects of the implementation.

It is necessary to interview the management and the salespeople using different frames as the questions to the management differ from the questions to the salespeople. In many cases, there are questions related to the same topic but from different points of view. For example, what activities do you input into the CRM system? (question for the salespeople) What activities should be input into the CRM system? (question for the management). By doing so, it possible to form a comprehensive image on how the system is running in the company.

3.2 Background information about the company

Vitrea ltd. is a small company that imports, sells and installs different types of special glass solutions mainly for construction. Its main customers are construction companies, architects and retailers throughout Finland. The company employs about 25 people at the moment from which up to 10 employees are involved in the sales and marketing activities. The rest combining for construction workers, administration and warehouse workers. Among its product offering are profile glasses, fireproof glasses, glass blocks, private glasses and other special glass products for various purposes.

The salespeople of the company each have their own products of which they generally sell. However, as for any small company it is not extraordinary for salespeople to have to sell other products than the ones they are in charge for. Also, it is typical that one customer may be in contact with more than one salespeople from the company. Therefore, it is crucial that the customer information is conveniently available for all the salespeople within the company to avoid confusing messages sent to the customer. Unfortunately, the information flow within the company historically has been deficient to some extent. This is unbearable for the company as it deteriorates the customers' perception of the company, ultimately leading to decrease in sales. This occurs especially with some projects that concern products from different categories. This is one of the major reasons, the company chose to adopt a CRM system.

Moreover, one of the characteristics of the company is that each of the salespersons possesses an immense amount of information regarding customers and projects. Most of the salespeople have been with Vitrea Ltd. for a long time and know a lot of detailed customer information that others do not know. This is why it was important to set up a system where all the customer information was gathered conveniently for all the salespeople to use when needed.

Vitrea Ltd. implemented Microsoft CRM dynamics software in April 2015, so the software has now been running for a year and a half. The company previewed many different CRM software in order to find the one that they felt would be the best fit for the company. The company decided on Microsoft Dynamics CRM as it they felt it would best suit the predetermined requirements and desired features they were looking for. The software selection and implementation were mainly handled by the CEO and the development manager of the company. In the beginning of the implementation the company hired an external consultant company to tailor the CRM system to the desired state. The external consultancy lasted about a week. Along the beginning of the implementation the salespeople were trained to use the CRM system so that they would know how the system functions and learn the basic things they needed in order to start using the system. Another subject of training was the working practice training where the salespeople were trained about the practices on how they should use the system. Furthermore, this meant training about for example how a new sales opportunity should be named in the system and other procedures that were designed by the management in order for everyone to use the system in the most effective manner. After the initial training the system was taken to use. Throughout the first weeks of using the system, further training was held and feedback was gathered from the users in order to make required adjustments to the system. Now, the system has been running for about one and a half year and is fully in use in

the company. The following sections describe the current situation of the CRM usage and evaluate how successful the implementation has been and most importantly, what are the factors that have caused the implementation to be successful or unsuccessful.

3.3 The goals and expectations of the CRM system

Vitrea Ltd. had set up goals and expectations towards the CRM software and they have been well documented. This section will go through the original goals and expectations that the company had towards the system and evaluates how they have been achieved. The evaluation is done based on interviews with the CEO of the company, the development manager as well as the salespeople of the company.

3.3.1 The goals and expectations of the CRM system

The goals and expectations of the CRM system were documented prior to the implementation process and below are listed the major goals and expectations that the CRM software should establish within the company.

- Creating a centralized database of customer intelligence
- A tool that identifies the different customs each customer is used to, for example pricing preferences
- A tool that helps the salespeople in everyday business practices
- Works with the legacy systems of the company
- Establishes a position as the main tool that the salespeople use in everyday work.

3.3.2 How the goals and expectations have been met

The implementation of the CRM software in the company has been successful overall, although some of the goals are not yet completely satisfied. This chapter will go through each goal separately and evaluate how well the implementation has succeeded in fulfilling the goal.

Creating a centralized database of customer intelligence

The CRM software implemented in the company has successfully created a centralized database of timely customer intelligence as all the salespeople within the company actively use the software as a tool to enter new sales leads to it, which are linked to the correct customers and projects, found in the database. This have led to the situation, where the management can have a much clearer image of what activities the salespeople are undertaking and with which customers. Also, the software has enabled for the management a much greater view of the timely, active sales opportunities and marketing leads.

There has been a significant improvement in understanding what is going on in the company compared to the old custom of doing things, where each salespeople would hold on to their specific knowledge about the situation and in some meetings, the knowledge would be shared in order for the management to be on board with what is going on. The implementation of CRM software brings a lot of visibility especially for the management concerning what is going on in the company. This is true also for the salespeople of the company as with the help of the CRM system, the salespeople can also see and recognize what is going on in the company.

“Because of the system, seeing and understanding what is happening in the company is convenient” – Salesperson

“Even for a small company, this kind of system is crucial as there are constantly numerous amounts of customer contacts” – Salesperson

Furthermore, creating a centralized database of timely customer intelligence, through implementing the CRM software, has also been useful for the salespeople within the company, as most of them feel that with the new system they are able to keep up with what kind of activities have been practiced with specific customers and are able to serve their customers better. This is because they can easily look up for details about what kind of agreements have been made with the specific customers earlier, for example, instead of having to try and fish the information from other salespeople.

“Before the implementation of the CRM system, if a salesperson was on a vacation and a customer would call in to ask about something, that had been handled by the salesperson on a vacation, it was impossible to help the customer, unlike now when the information can be found in the CRM system. The system is useful in that way” – Salesperson

Not only does the CRM software help the salespeople in situations where a specific customer might have interacted with another salespeople in the company, but also in their own notes as they now have one database where all the data should be input. This way there is no need for their own ways of taking notes about customer intelligence but all the information can be quite conveniently found in one place.

“Without the CRM system, there would be some kind of chaos within the company regarding the information flow throughout the salespeople” – Salesperson

“The system has eased my work as now there is one system to which I can enter all the relevant customer information and especially find it easily, instead of going through countless pieces of paper” – Salesperson

The CRM software implementation has been successful in creating a centralized database for the customer intelligence. Even though sometimes, the information may not be completely timely or complete, the introduction of the system as a database for the customer intelligence has been very beneficial for the company. The reason for inaccuracy of some of the information is that some of the salespeople are still not completely on board in using the system quite the way it is supposed to be used. Overall, however, the implementation of the system to form one centralized database for customer information has been praised. This was probably the biggest reason for implementing the CRM software and this factor of the implementation has been a success.

“The CRM software is essential in a sales and marketing company where there is a lot of customer activity, in order to have this one database where the customer information is input” - CEO

Tool that identifies customs and general information about customers

The data that has been input in the CRM system has been mainly activity based so far and the information about different customer preferences and customs have not been entered to the desired level. It would be beneficial to write about the different characteristics each customer has, provided there is that kind of knowledge about them. This would especially be beneficial for any new salespeople that would join the company as they could easily see if there are any customs or preferences the customer expects to be dealt with.

According to the CEO of the company, this specific aspect could be improved in order to make the CRM system more beneficial. Furthermore, one salesperson mentioned in an interview that for example, one customer company may have significant amount of contact personnel listed for that specific company profile and sometimes it can be difficult to know which one to contact in specific cases. If there were instructions listed about which person to contact in different cases from that specific company, entailed in the company profile within the CRM system, it would make things easier for the salespeople and they didn't have to go hunt for that information from their co-workers for example.

The goal of having the CRM system work as a tool that identifies customs and general information about customers has been more or less unsuccessful. The salespeople use the system so that they enter the timely customer activities into the system which allows for a good understanding of what is going on in the company, but as far as acting as a tool that explains general information about a customer it has not succeeded. The intention was that as the system is implemented, all the salespeople would write the essential information about customer preferences etc. into their profiles, so that any new salesperson to the company, could immediately see, how the customer is used to being dealt with for example. Now this kind of customer intelligence is still hidden in the minds of the salespeople and not visible for anyone else.

The management has not demanded the salespeople to thoroughly enter this kind of information into the system as the everyday usage of the system has been receiving most of the focus. It is still possible to have the salespeople enter all the essential information about the customers they are familiar with into the system. This would help serve at least any new salespeople in the company and the CRM system would be even more beneficial with the timely customer activity information as well as the essential general information about customers.

Tool that helps the salespeople in everyday business practices

The salespeople of the company have generally been pleased with the new CRM software and most of them would not want to go back to the old way of doing things. They have adopted the system as the main tool that helps them in their work. However, the degree to how well the salespeople enter the customer information and different activities differ from person to person. Also, not all of the salespeople have been so thrilled about the new system. One salesperson felt as the system was more time consuming than the old way of doing things and also felt as

the CRM software was implemented not to help the salespeople but rather only the management or possible new salespeople that wouldn't have the current knowledge about the customers.

"It is amazing how we have been able to deal with things the way we did before the system, where all the customer information was stored in each salesperson's own notes, minds or any other random place" - Salesperson

"For managing customer information about architects, the old way of doing things worked better for me than the new system and if I could choose, I would probably go back to the old way, even though the new system is probably better for the management and other aspects of customer relationship management" - Salesperson

Based on the interviews with the salespeople of the company, the attitude towards the system is generally very positive but at least one of the salespeople still feels as the system doesn't provide much to them but is mostly used in order to help management or potential new salespeople that would join the company. Therefore, it is clear that there is still some type of resistance towards the CRM system within the company.

"The new CRM system is not developed to help the current salespeople of the company but rather we are forced to use the system so that someone else will benefit from it"
– Salesperson

"For an experienced salesperson, to whom the CRM system is introduced, the first impression is that the system will only add to the work load but for a younger generation, the situation is probably different as they are raised alongside these types of systems" – Salesperson

The CEO of the company stated that all of the salespeople within the company are not thorough enough when it comes to entering the information to the system which leads to situations where the customer information within the system is not completely timely nor is it complete. This was supported by one of the salespeople of the company who stated that sometimes other salespeople don't input the required customer information into the system which leads to situations where there is confusion between a salesperson and a customer for example, because the salesperson can't see from the CRM system that another salesperson has already contacted the same customer about the same matter. Moreover, according to the CEO, the main hiccup in the usage of the system is caused not by not entering the information in the

system in the first place but rather maintaining and updating the information within the system as progress is made. However, the CEO also stated that despite usage of the system not being completely at the desired level, the system is still very beneficial and that most of the salespeople do enter the desired information into the system.

“Sometimes there are confusing situations with the customers when they have been contacted by other salesperson from the company regarding the same matter, even if it didn’t state so in the CRM system” – Salesperson

The development manager of the company describes the typical sales process in the following way: First a salesperson finds a lead on a new sales opportunity, usually by searching for new construction projects from the designated internet services that are used in the company or by having someone ask them about products for a new construction. Then the salesperson enters the known information about the lead in to the CRM system. After that, the salesperson manages the sales opportunity and looks to give a quote on the products or services for that specific sales opportunity. After that, the opportunity is either realized or lost. All of the phases after entering the sales opportunity into the CRM system are managed with the help of the system. It is important to keep the sales opportunities up to date in the system, so that the management and possibly other salespeople can be aware of the current situation of each sales opportunity.

According to the development manager the salespeople generally speaking enter the new sales opportunities into the system scrupulously and update them pretty well so that the information about the sales opportunities is timely. However, the DM admitted that sometimes the information might have been forgotten to update by the salespeople but after noticing that the information is not up to date, they are updated in the system to correspond the current situation.

The different customer related activities that are entered into the system have been cut down to some extent from the original intentions. Originally, the idea was that all the different customer related activities would be input into the system. This would include the contents of all phone calls made to customers and every email linked to customer, project or sales opportunity profiles. This proved to be too exhausting for the salespeople and received quite a lot of resistance in the beginning. The salespeople argued for example that it will take them great amount of time to type in all the phone calls between them and the customers as they would have to do that after the phone calls as they are not comfortable with inputting the

information into the system while speaking on the phone. Moreover, they feel like they cannot focus on the conversation if they need to enter the information simultaneously into the CRM software. This means that the salespeople need to evaluate the importance of each activity between them and the customers as it is still important that all the essential customer information is entered into the system. However, by interviewing the salespeople it seems that it has been made clear to them, what kind of activities they should input into the system and how, as they all answered quite similarly to a question about what activities they enter into the system.

“For me, the most important thing that I definitely need to enter into the CRM system is the new sales opportunities” – Salesperson

“Whenever I feel that entering information into the system will benefit my work, I am much more likely to do so” – Salesperson

“I input all the essential customer information data into the system. Phone calls, meetings, emails etc. Everything that I think is of value to me or anyone else using the system” – Salesperson

The CRM software is used as a helping tool in the weekly sales meetings between the management and the salespeople. From the CRM system it is easy to see what new leads have been generated throughout a week and they are discussed within these meetings. This also works well as an incentive for the salespeople to find new leads as well as enter them into the system as it is very visible if there are little to no new entries from a salesperson throughout a week.

According to the DM the implementation of the CRM software has been successful as it has been proven to be a very useful tool for gathering customer data. Moreover, the DM feels that the desired basic functions of the CRM system are working well. However, according to the DM, the system is currently used only for very basic actions and that the potential of the software is much higher than how it is currently used. Therefore, once the basics are well handled by the staff, there are features in the system that can be implemented so that the system would be even more beneficial for the company. It is clear that most of the people in the sales staff that are not very comfortable using IT systems so it seems like a vice decision not to introduce too many features right from the beginning as it might seem too overwhelming for some of the salespeople. This has shown throughout the implementation as there have been

compromises and the system has been tailored to be quite simplistic in order to get some of the salespeople to use the system at the desired basic level.

Overall, the implemented CRM software has been successful in serving as a helping tool for the salespeople in their everyday business practices. This is true at least for most of the salespeople. One of the salespeople, however, is still somewhat unaware of how the system is beneficial in their daily working practices. It would be important to have all the salespeople feel as the system is helping them instead of making things more difficult for them. Moreover, it would be good for the users but also for the accuracy of the information in the system if all the users are fully dedicated to using the system in the desired manner.

Works with the legacy systems

The CRM software does work well with the legacy systems that are used in the company. The main tool that the salespeople use besides the new CRM software in their daily work is email. The email that the company uses is Microsoft Outlook and as the CRM software is Microsoft Dynamics CRM, they are both Microsoft systems and are very compatible with each other. It is easy to bring emails into the CRM system or the email can be directly sent using the CRM system. Similarly, when creating a task for example using the CRM it automatically transfers it into the calendar of the Outlook.

“It is very convenient to mark the future meetings into the CRM system as it automatically, transfers the details also into my Outlook calendar” - Salesperson

The compatibility was praised by the salespeople in during the interviews and all agreed that the systems interact very seamlessly with one another. This is very important as it makes the CRM software usage more effective.

The salespeople also use an internet service FaktaNet Live in order to search for new construction projects to find sales opportunities. This service is not compatible with the CRM system as the possible sales opportunities need to be manually brought into the CRM system. This however, is not that frequent that it would be a problem for the salespeople of the company and no one stated that they would need an integration between the service and the CRM system.

The implemented CRM system interacts well with email and the CRM and email are the two most commonly used software tools by the salespeople of the company. All of the

salespeople agreed that the integration between the two systems is seamless. Therefore, it can be said that the CRM system works well with the needed legacy systems of the company.

Establishes a position as the main tool that the salespeople use in everyday work

The CRM software has become the main tool for all the salespeople within the company. As mentioned above the CRM tool along with the email are the main software tools that the salespeople use. In addition to the two, the salespeople also use for example internet services for finding new sales leads but as far as everyday work, the CRM software is the main tool where all the relevant customer information is entered and found.

However, at least one of the salespeople felt as they still hadn't learned how to do their work with the help of the system but rather continue to work using the old ways and after something has realized that needs to be entered into the CRM system, they will do so afterwards. For example, entering the details about a phone call into the system would happen after the phone call. This was true for most of the salespeople though as no one felt comfortable typing in a phone call to the CRM system while they were speaking on the phone and they rather afterwards enter the important details into the system.

"I don't feel comfortable entering the details of a phone call to the CRM system while I am on the phone as the typing would interfere with my ability to communicate with the other person" – Salesperson

"Most of the times I am more likely to look for an address of a customer using Google than the CRM system" – Salesperson

"I usually add emails to the system within one or two days from receiving or sending them, whenever there is a good opportunity to do so, phone calls I usually enter into the system right away" – Salesperson

The DM stated that for a while now the salespeople have adopted to using the system and the implementation phase has turned into a situation where the CRM system has taken its place as the main tool used by the salespeople. According to the DM, the salespeople haven't for some time requested much assistance on how to use the system but have learned the basics and are using the system without complaining about it but also without praising it. In that perspective, it can be said that the implementation has been completed successfully in that aspect as the system has stabilized its place in the daily usage of the salespeople.

“I had not had any experience in a CRM system before this one and as the software was introduced, there was clearly some type of resistance to change as neither had the other salespeople used such software earlier, but after using the system for over a year now, I have noticed that it is a very useful tool” – Salesperson

“The initial image of the CRM software was positive but quickly it turned negative as it felt that it will only add to the work burden without bringing benefits to the salespeople and now after using it for a year, it has become more or less neutral” – Salesperson

One thing that the DM noted about the stabilization of the CRM system is that, now as the salespeople have grown accustomed to the system, they are not making suggestions to improve the system but are happy with the current features and level of usage of the system. As mentioned above, the CRM system has many features that are included in the package that might be useful for the company but are not currently used. Therefore, now that the salespeople are accustomed to the software and generally speaking have positive attitude towards the CRM system, it might be worth investigating the other features that the software possesses in order to find even more benefit from the system.

“It appears that the current level of usage of the CRM software has been sufficient as there haven’t been much discussions lately about how it should be used”

– Salesperson

“There is no need to ask for help regarding the system usage on a daily basis anymore and the basic skills have been assimilated” – Salesperson

The successfulness of achieving the set goals and expectations within the case company is summarized next. The goal of *creating a centralized database of customer intelligence* has been successful. Management and the most of the salespeople feel that the system is superior compared to the old way, where the customer information was scattered around in salespeople’s notes, minds or some other places.

The goal of the system working as a *tool that identifies customs and general information about customers* has been unsuccessful for the most parts. The users enter the timely customer activities into the system well but the general information about specific customs or pricing, for example, is largely missing from the system currently.

The goal of establishing the system as a *tool that helps the salespeople in everyday business practices* has been successful for the most parts but not entirely. This is due to the fact that even though all the salespeople of the company use the system, not all agree on the benefits of the system in their own work. While most of the salespeople feel that the system helps the management as well as the salespeople in their everyday work, not everyone feels so positive about it.

The goal of having the system *work with legacy systems* has been successfully completed. The CRM system works seamlessly with the email system of the company and these are the two main software tools that the salespeople use in their daily work.

The goal of the CRM software *establishing a position as the main tool that the salespeople use in everyday work* has been successful as all the salespeople of the company are using the CRM software as the main software tool along with the email in their everyday work. While, the attitude toward the system may not be extremely positive toward the system for all of the salespeople, all are still using it.

3.4 The software selection

This chapter describes the different attributes and the functional requirements that were important for Vitrea Ltd. concerning the CRM software selection and how the attributes have been met with the selected system. The attributes were documented pre implementation and some of them are very detailed and case sensitive.

3.4.1 The important CRM system attributes for Vitrea Ltd.

Following are the important features for the CRM system as seen prior to the implementation.

- Easy to use
- User interface is clear, and different features are conveniently accessed
- Compatibility with legacy systems of the company
- Creating customer profiles that can be easily linked to designated projects
- Projects can be defined by their statuses (for example prospect or realized project)

- Overall the projects and customer profiles can be configured to reflect the needs of the company
- Adding notes, about communication or other details for example, can easily be applied to customer profiles and projects
- The notes related to customers or projects are easily visible for any salesman when they open the customer or project in question
- Linking documents to customer or project profiles. (For example old order confirmations)
- Modifying the customer and project profiles is possible and relatively easy (Administrator account for that so that each salesman cannot edit the fields by mistake)
- The possibility of using the system with mobile devices
- The timeframe of implementation should not take more than four months from the start.

3.4.2 How have the important attributes been met

The CRM software, Microsoft Dynamics CRM, is quite easy to use. Almost all salespeople agreed that the basic activities, such as entering a phone call information into the system, work logically and by having used the system for a while, are easy. Some of the salespeople felt that the user interface might not be so logical in the first time using the system but stated that after using the system for a while now, it has become clear and they have no problem using the different features, they are currently using.

“After a few weeks of using the system, the everyday usage was simple; Entering activities, searching for information and understanding what is going on is easy” – Salesperson

However, not all the salespeople feel that the CRM software is quite that is to use. Especially it seems that the many features present in the system can be confusing to a person with lower IT skills. Even if the salespeople are not expected to use all the features that the software possesses, by having them visible in the system appears be confusing to some users.

“With the current IT skills, the system doesn’t feel easy. I felt as the system could have been made more simple” – Salesperson

Moreover, the system was criticized by one of the salespeople because as the intention is to enter all the essential customer information into the system, it means that before entering a new activity to the system, there needs to be a customer profile in the system to which the activity is then linked. Obviously, it is possible to create a new customer profile if it doesn't already exist in the system but this seems to be a bit of a burden to some of the salespeople in the company especially in situations where there are for example many contact persons from one customer company and the different contact persons all need to be created into the system. Additionally, in these types of companies, according to the salesperson, the personnel changes regularly which means that there are always new people calling from one company and adding all of the contacts to the system means a lot of work.

“In a customer base where the employee turnover is high, it takes immense amount of time to add new contact person information into the CRM system” - Salesperson

As described in the 3.2.2 goal and expectations chapter, the CRM software is very well compatible with the email system the company has and these are the two main software tools, the salespeople use in their daily work.

“After using the system for a while now, the interaction between Outlook and the CRM system seems logical” – Salesperson

Managing the sales opportunities and projects through the CRM system seems to be quite easy to some of the users within the company and some salespeople stated that having these tools have helped them in their everyday work. On the other hand, this is not the case for all the salespeople as one stated that they haven't learned how to use the system so well that these features would benefit them in their work.

“The benefits for managing projects through the CRM system are unclear to me”

- Salesperson

According to the development manager, the implemented CRM software is basically doing everything it was supposed to do. The features that the system beholds, are good and functional. He feels that some of the solutions within the system could have been made easier or more intuitive but overall, the software is very good for the purpose it was implemented to.

The linkages between the customers, projects and sales opportunities work well in the CRM system and navigating between the projects, customers and sales opportunities is logical. The sales prospects are different from projects in the CRM software. Should a sales prospect

realize into a project with installation, a separate project is started from the realized sales prospect.

Searching for information from the CRM system seems to work pretty well for the most parts. However, one salesperson stated that searching for information within the system can be difficult sometimes. Moreover, finding the needed information from the system requires that the information is input into the system in a logical way. This means that it is crucial that, everyone in the company realizes how the information needs to be entered into the system and acts accordingly.

“Finding information from the CRM system is easy, assuming that the information is entered into the system logically for example, naming the projects are done following the set procedures” – Salesperson

The profiles of customers, projects and sales prospects are very customizable in the system. It is possible to define the fields within the profiles to the liking of the company, as well as selecting which fields are mandatory to fill when creating a new profile and so on.

One of the benefits of the system as seen by the development manager, is that the software allows the tailoring to be done through the tools that are provided in the system. This means that in order to make changes to the fields within a profile for example, there is no need to code the changes, which first of all makes things easier as there is no need for coding expertise and secondly, as the changes have been made with the tools within the software, whenever there is an update to the CRM system, the changes stay as they were before the update.

The CRM software uses different activities to mark the communication with the customers. For example, incoming and outgoing phone calls, emails, visits etc. These are then listed in the designated customer, project or sales opportunity profiles depending on which the activities are linked to. This works pretty well typically, however sometimes if there are a lot of activities linked to a profile it may be difficult to find a specific activity from the profile page. Linking documents to the profiles is also possible and logical.

“Linking documents to profiles is simple and adding activities to them is easy”
- Salesperson

However, there have been some issues also regarding the logic of the system by some of the salespeople. It seems that the system is not working quite as intuitively as some of the

user would hope. According to a salesperson, for example, closing an opportunity or project in the system can be done in a couple of different ways which can cause confusion to a user who is not entirely confident in using the system. This is supported by the DM according to whom there are some aspects in the CRM system that could be easier and more logical.

“For example, the system allows me to change the status of a sales opportunity by clicking the next stage, however when I closed the profile, the updated status didn’t appear in the system as I should have changed the status by using the arrows that change the status to the next stage” – Salesperson

Moreover, even though some of the features of the CRM system are not perfectly logical, it seems that overall the system is considered pretty easy to use and consistent after using it for a while and getting used to it. This was supported by the DM, CEO and most of the salespeople in their interviews who all agreed that after using the system for a while, using it becomes fluent.

“After blundering the changing of a status in a project profile for a few times, I started remembering how it needs to be done correctly” – Salesperson

The CRM software does have a possibility to be used with a mobile device but that currently is not in use by any of the salespeople. One salesperson said in the interview that they had tried the mobile application but according to them, it did not work as there was some technical issue. According to the interviews with the salespeople, most of them believed that they would not benefit from the possibility to use the CRM software with a mobile device. However, the CEO of the company instead believed that having the mobile application running the CRM software would be a good thing as the salespeople could use the CRM software with a tablet for example while meeting up with the customers.

The CEO of the company stated that the different management tools that the software provides are great. As it can be seen from the required features of the system, created prior to the implementation, there are no mentions about the management tools. So the tools that help the management in monitoring the active sales opportunities for example has been an addition that wasn’t required before the implementation but has proven to be very useful. Moreover, by that aspect, the system has exceeded the expectations.

It seems that the Microsoft Dynamics CRM is working well for the purposes it was implemented in the company. But now as the system is operating within the company and it has been noted that the system has a lot more potentially beneficial features in it that are yet to

be used, the management would be willing to start taking these additional features to use in order to make the software even more valuable for the company. According to the salespeople however, they were not able to mention any possible features to the system that they would find beneficial toward their working practices, instead many said, when asked about possible additional features, that there might be features in the system that would benefit the management.

The software selection within the case company has been overall successful. The system is easy to use for the most parts and even though some of the features within the system do not seem logical, by using the system for a while, using it becomes fluent. The system is capable of performing all the desired actions and possesses all the required features and many more that may be beneficial in the future when the company might extend the usage of features of the system. The system is very well compatible with the email and the two form the most used software tools by the salespeople of the company in everyday use. Additionally, the management support tools within the system have been well received.

3.5 The implementation phase

This chapter identifies the different factors that are important in CRM software implementation and evaluates how meaningful they have been in this specific implementation process. It would not be fair to say that the implementation of the CRM system within the case company would have been totally unsuccessful as it is used and the reception of the system has been appraised at least to some extent. However, it is clear that the system is still not used completely as planned, and from that perspective it could be argued that the implementation has been unsuccessful (Pan et al. 2007).

Based on the interviews of the salespeople, the development manager and the CEO of Vitrea Ltd., the different critical success factors of CRM software implementation, as per the theoretical framework, are reviewed.

3.5.1 Management support and involvement

Management support and involvement have been very present in the CRM software implementation process within the company. The CEO of the company has been the main advocate in adopting the CRM software. Especially in the small and medium companies the management support and involvement is absolutely crucial in order for the implementation to be successful. This has been the situation in the case company. As the adoption has been driven by the CEO, the implementation has been given the needed resources, financial and other, such as time. The development manager was hired to the company before the company made the selection of which software to implement, but the decision to adopt a CRM software had been made prior to the DM stepping in to the company.

The DM of the company is very familiar with the different CRM software systems as he has been involved in developing such systems for bigger companies prior to starting in Vitrea Ltd. The CEO and the DM have been the people that were managing the implementation process within the company. As oppose to larger companies, where the management might delegate the task of implementing a CRM software to some department that would be in charge of the implementation process, or even the idea of implementing a CRM software might come from lower levels of a company. In Vitrea Ltd. the decision to adopt a CRM software came from the management and CEO and the management was in charge of the implementation, including for example determining the requirements, selecting the software user training and other different implementation related activities.

The DM has been in large parts responsible for keeping the CRM software running as desired. Also, the DM is acting as a support person for the salespeople regarding any technical or working practice related issues concerning the system. This has been assimilated well by the salespeople as whenever there is a problem, either technical or working practice related, the salespeople of the company first turn to the DM, provided they can't find a solution for example by asking from co-workers. The DM is ready to solve the issues and support the salespeople in using the CRM system in the desired way.

“The DM is always able to help when needed and usually when there is an issue, it is user related” – Salesperson

“The management support is good” – Salesperson

“If I have any questions regarding the system, I usually ask first from other salespeople if they know the answer, if not, then I ask from the DM and if the answer is still unclear I ask from the CEO” – Salesperson

The software education has been sufficient according to the salespeople in general and there has been sufficient support from the management in order to learn the needed skills for the software usage.

Management support and involvement has been significant in the case company as the top management has been directly involved throughout the implementation process. The management also uses the CRM software by entering customer information into the system themselves as well as using the management support functions that the system possesses where the current situation of the company sales possibilities, for example, can be monitored. The management has also designated the desired resources in order to make a successful CRM software implementation possible.

3.5.2 System compatibility

The CRM software to be implemented would have to be compatible with the legacy systems that are used in the company and the software needed to be able to deliver the expected results set prior to implementation. The software selection and how well the new system has been able to fulfill the goals and expectations that was set to it, is describes in detail in section 3.4.2 *How have the important attributes been met*. Therefore, this section describes more about the IT situation prior to the implementation and compares it to the current situation. Additionally, it describes some of the configurations that needed to be made in order for the implemented system to be compatible with the other systems that are used in the company.

Before the implementation, the company didn't have a centralized database for customer information. The information was much more fragmented than after implementing the CRM system. The salespeople used email and FaktaNet Live, internet service where they could search new construction projects for sales opportunities. It is possible to make notes to the construction projects in the FaktaNet Live service, that are visible within the company using the service. These notes were used irregularly, depending on the situation and most of the customer information was held in the minds of the salespeople. In addition, the salespeople were entering their quotes to an excel spreadsheet, where the management could see how many active quotes they have as well as some details about them. Overall, however the customer

information was very scattered throughout the salespeople's own notes, their minds, spreadsheets, email and FaktaNet Live service.

By implementing the CRM software, the essential idea was to gather all the scattered information into one place, clearly visible for the management as well as the salespeople. This change would help the management as well as the salespeople of the company. After the implementation, there was no need for the excel sheets anymore as the quotes are placed straight into the CRM software. FaktaNet Live service is still used in the company as it provides the salespeople with crucial information about new construction projects, however, now the notes that were made in the FaktaNet Live system are now systematically done in the CRM software as the new construction projects are transferred into the CRM system as potential sales opportunities. This allows for the information to be timely and comprehensive. The emails can now be linked straight into the CRM system conveniently, so that important information from the emails can be found under the correct customer, project or sales opportunity.

According to the development manager, there were some difficulties in the beginning of the implementation in the email configuration between the CRM system and Outlook as the email were not transferred from the Outlook to the CRM system quite as desired. However, these difficulties were overcome without too much agony. Also, it is clear that adjustments to the system needed to be made throughout the implementation process but especially in the beginning when the system was initially tailored according to the requirements of the company. Moreover, this meant for example that the customer, project and sales opportunity profiles needed to be adjusted to answer the needs of the company.

Additionally, after the CRM software was taken into use, during the first months, further adjustments were inevitable as only by using the system it is possible to see how well some of the decisions work are in everyday use. Things, such as mandatory fields that needed to be filled when entering a new customer for example, needed to be adjusted in order to make the usage of the system more fluent.

The company needed to make adjustments to their IT systems in order for the CRM software to be compatible with the legacy systems but also with the requirements that the company had set for the system. The compatibility of the system with the required features of the system has been evaluated in detail in section 3.4 *Software selection*.

3.5.3 Involvement of end users

Involvement of the end users is identified as one critical success factors in the IT implementation within academic literature and according to the salespeople of the case company, the end users were involved in the implementation process at least to some extent. Most of the salespeople remembered that there were meetings in which the system was introduced to the salespeople and their comments were listened. As the salespeople within the case company are not very talented IT users, most of them were quite negative towards the system in the beginning as they thought that it was too complicated to use and that they would spend most of their working days trying to input information into the system, so that using the system would only distract them from working effectively.

“I remember the first times when the system was introduced and most of the salespeople in the room felt as the system would be implemented to pester the salespeople. The management tried to justify the system by highlighting the benefits it would bring”

– Salesperson

Originally, the idea was that basically all the customer activities would be entered into the CRM system, for example when a customer called a salesperson, while talking on the phone with them, the salesperson would write the main points to the system so that all the customer activity would be recorded into the CRM system. This however, was one of the things that wasn't successful as the salespeople of the company felt as doing that would interfere with them concentrating to the discussion with the customer. As it was not possible to input the information while talking on the phone, the salespeople would have to write the information into the system after the phone call but this way was too slow and it took too much time from the salespeople to record every phone call into the system. Therefore, it was necessary to change the procedure so that only important information would be recorded into the system. This means that the salespeople need to use their judgement and the given instructions on what information is important enough that it needs to be input into the system. Moreover, there are instructions in the company that define what kind of information needs to be input into the system and these practices have been communicated to the salespeople.

“We did have appropriate discussions with the management about the workload that entering every single activity into the system would bring to the salespeople and the procedures were changed so that only the important information needed to be entered into the CRM system”

– *Salesperson*

Moreover, one of the things that some of the salespeople saw as too much of a burden initially was that whenever they created a new customer, project or sales opportunity profile, there were too many compulsory fields that needed to be filled and because of that, creating the profiles was too slow. The compulsory fields have been cut down from the initial situation to speed up the process of creating a new profile into the CRM system. This however creates a new challenge as if the number of limited fields is very low, there is a risk that the salespeople only fill the few compulsory fields and don't come back to fill more fields when they have the time to do so. This would lead to situations where there is a profile created into the system but the information about it is insufficient and the benefit of having that kind of information in the system is minimalistic.

“Gladly, there are not many compulsory fields anymore that need to be filled in order to create a new profile, the less the better” – Salesperson

One of the salespeople felt as the implementation should have happened in smaller phases, so that only parts of the software would have been initially taken to use and not the whole system simultaneously. As the whole system was simultaneously introduced and right away it was expected to be used the way the management wanted it to be used, it seemed too much of a burden right away.

“It was expected right from the beginning that the system would be used as the DM demanded. It is understandable that the system was expected to be used in the desired manner to make it work but they didn't realize how much time it took to do so.

– *Salesperson*

User training was included in the end user involvement in the literature review. And there has been sufficient amount of user training in the case company according to the salespeople of the company. One of the salespeople suggested that especially for companies where the IT skills of the users differ from one another, the user training could be organized in different groups based on the IT skill as according to them, it can be very frustrating for the users with lower IT skills when they take a lot longer to assimilate some of the features compared to the users with higher IT skills. Similarly, it can be frustrating for the faster learners if some things need be gone over many times, when they already have assimilated them.

While the salespeople stated in the interviews that there has been adequate amount of user training, some of the users still appear to struggle in using the system, the way it would benefit their work. Therefore, as most of the users have understood the benefits of the system and are comfortable in using it, it seems that additional user training might be beneficial for the company in order to get all the users be comfortable to use the system and understand how it can be beneficial for them.

Involvement of end users is important in a CRM software implementation as it is likely to reduce the resistance to change when the users feel like they have a chance to create a system that takes into account their wishes. For the case company, the end user involvement was existing but not comprehensive. The case company did have some conversations between the salespeople and the management prior to the implementation where the system was introduced and the salespeople were allowed to express their thoughts and to some extent the they were listened already before the implementation. The bigger impact from the end users came however after the implementation when the system had been put in use. The salespeople felt that the initial idea to enter nearly every customer contact into the system was too exhaustive and impossible to fulfill without interfering with their work effectiveness. This brought changes into the practices as to how the system would be used.

Moreover, the end users weren't much involved in the specification or the software selection phases as to what kind of system the company would acquire but more in the implementation phase and after the implementation when the salespeople's input was listened and the working practices were adjusted accordingly. By involving the end users more in the early stages of the implementation it is possible that the salespeople would have had a more positive initial image of the system and they would have been less resistant towards the system and now after one and a half years after the implementation the situation could be better, so that all of the salespeople would clearly understand the benefits of the system. The higher involvement of the end users also in the early stages of the implementation doesn't necessarily mean that they would have a huge impact on the specification or software selection but it would make the end users feel as they are part of the process of finding a new tool that will help them in their work, therefore, the resistance towards the system should be lowered.

3.5.4 Determination of requirements

The determination of requirements is an essential part of successful IT implementation, as it helps companies in the software selection as well as evaluating the successfulness of the implementation. In this case, the requirements were well determined before the software selection and the beginning of the implementation process. The requirements were determined regarding the goals and expectations from the CRM software as well as the desired features that the CRM software should possess. In the chapters above, the requirements of the system are listed and evaluated post implementation. By reviewing the requirements after the implementation, the successfulness of the CRM software implementation as well as the software selection can be evaluated.

Section 3.3.1 lists the goals and expectations towards the CRM system that were set prior to the implementation. In the following section 3.3.2 the goals and expectations are reviewed in order to see how well the pre implementation expectations toward the system have been realized after the implementation. Similarly, in the section 3.4.1 the required features from the CRM software perspective are listed and in following section 3.4.2 the required features of the system are evaluated to see how well they have been realized.

For the case company, the requirements were well determined prior to software selection and implementation and doing so thoroughly prior to implementation is essential in successful CRM implementation. Moreover, determining the goals and expectations of the CRM software is important as it highlights the strategic adoption of the system. Furthermore, the CRM software should be adopted in order to solve some kind of problem or more specifically add value to the company processes. It is important to contemplate beforehand, what it is that the system should bring to the company.

Similarly, determining the functional requirements of the system should be done with consideration to the desired expectations from the system, the level of IT skill in the company and other case sensitive aspects. The determination of functional requirements helps significantly in the software selection.

3.5.5 Solidifying working practices

In order to reap the most benefits from a CRM software, a company needs to solidify its working practices. This means for example that companies need to make clear to its staff how they want the system to be used, so that the required customer intelligence is input into the

system. These working practices differ from company to another. For the case company, solidifying working practices has meant that there has been a change to how customer information is stored which means that, the working practices for the salespeople have seen significant changes in order to make the new CRM software be beneficial for the company.

As the salespeople prior to the implementation stored most of the customer data in their own notes or their minds, now they are required to input the customer intelligence to the new CRM software. This kind of change probably never comes without some resistance, neither has it in the case company. For example, in an interview with one of the salespersons of the company it became clear that they felt as entering the customer data into the CRM system is done so that someone else might benefit from that information in the future. The salesperson felt that the main reason they need to enter customer data into the system is for future purposes as if a new salesperson would enter the company, he or she would benefit from the customer information in the system and it was clear that they didn't feel as though they benefitted much themselves from entering the customer data into the system.

“The new CRM system is not developed to help the current salespeople of the company but rather we are forced to use the system so that someone else will benefit from it”

– Salesperson

Most of the salespeople however feel that the new way of doing things is much easier as the relevant customer information is conveniently accessible and there is no need to dig for that information from their own personal notes or some other salesperson's notes.

“Not only does the CRM system help the company, but it also helps me in my work as it is so much easier to form a complete picture of customer management when all the data is in one place and not scattered around in email and paper notes”

– Salesperson

For the company, implementing a new system has meant that the management has needed to create guidelines as well as manuals on how to use the CRM system so that all the desired customer intelligence is entered into the system in the right way. The first step in solidifying the working practices regarding the CRM system usage has been teaching the salespeople to use the system effectively. The education doesn't stop in teaching how the different features work in the system but it is also crucial to teach the staff on the procedures that are expected of them. This means that the salespeople need to know what kind of

information and how they should store it into the system as well as where in the system should a specific entry be marked to. For example, it is critical that the salespeople recognize under which profile an email, consisting information about two different sales opportunities, is placed. These kinds of guidelines need to be well-defined to the staff and manuals about them should be available to be read.

“It is important that there are manuals created, that show and tell the desired working practices regarding the CRM usage for example. They provide a kind of stability as by showing them to the staff, it can be assured that there are clear instructions on the desired working practices” - CEO

The development manager of the company describes the typical sales process in the following way: First a salesperson finds a lead on a new sales opportunity, usually by searching for new construction projects from the designated internet services that are used in the company or by having someone ask them about products for a new build. Then the salesperson enters the known information about the lead in to the CRM system. After that, the salesperson manages the sales opportunity and looks to give a quote on the products or services for that specific sales opportunity. After that, the opportunity is either realized or lost. All of the phases after entering the sales opportunity into the CRM system are managed with the help of the system. It is important to keep the sales opportunities up to date in the system, so that the management and possibly other salespeople can be aware of the current situation of each sales opportunity.

In the case company, there have been a lot of education especially in the beginning as to how the new entries should be marked into the system for example. Moreover, it is crucial that projects and sales opportunities for example are named using a fixed procedure so that they are all similarly, logically named. If this is not done thoroughly, it becomes very difficult over time to find the desired projects and sales opportunities from within the system. There are also manuals to help in making these procedures clear for anyone in doubt. According to the DM, these kinds of basic working practices have been quite well understood by most of the salespeople and currently they know pretty well how they are expected to use the system. The working processes, as for example what to do when a salesperson gets a lead on a new sales opportunity, are well documented in the company. These manuals aid the salespeople in using the CRM software in the desired manner. It is clear that after a while the processes become automatic and there is no need to go through them every day, but rather occasionally to make sure that the working practices haven't changed over time to undesired directions.

“It has been made clear as to how the CRM system is expected to be used”

– Salesperson

“The salespeople are using the system the way it is supposed to be used”

– Salesperson

For some of the salespeople it still however seems that the procedures on how to use the CRM system and especially what is the sufficient level of usage of the system are a bit unclear. As the salespeople within the company deal with sales that differ very much in value, some of the salespeople don't feel like it is that important to enter the smaller sales into the CRM system and the company has set up a minimum value of sales that will be entered into the system. This means that some of the salespeople that are in charge of products where a value of one sale is usually quite small, don't have to enter nearly every sale or sales opportunity into the system. Moreover, the salespeople that have been using the CRM system more, have become better at using it.

“It is not very clear as to what is the level of usage of the system that is desired by the management as it seems that the level of how much each salespeople within the company uses the system seems to differ quite a lot” – Salesperson

One of the issues as mentioned by the DM regarding the working practices along the implementation was that they wanted to handle giving quotes through the CRM system as there is a feature that would enable that. However, the process of giving the quotes was different from the way they had been done prior to the system and eventually decided to go back to the old way of giving quotes, where the quote is made to a separate sheet and attached to an email and further sent to the customer. Now the link of the email is attached to a sales opportunity with the quote attached in the email but in order to see the quotes clearly in the CRM system, the quote would need to be manually filled in the system. This means that a salesperson would need to first fill the actual quote that is sent to the customer and after that, fill a similar quote in the CRM system so that it clearly visible in the system. It is obvious, that filling a quote twice is not effective use of anyone's time and the DM stated that in order to make the quotes appear well in the CRM system they should use the quote making feature of the CRM system and adjust their old habits of giving quotes. One of the issues of the CRM system as stated by the CEO was observing the active quotes as most of the quotes are just attached to the emails, sent to customers, that are transferred to the system. Therefore, it really seems that it would be

beneficial to try and change the quote making through the CRM system, leading to the quotes appearing in the CRM system completely and easily visible.

Solidifying working practices is crucial in order to find success in a CRM software implementation as it is essential that the software is used in the desired manner in order for it to be effective. For the case company, there has been significant effort in solidifying working practices. There are well planned instructions on how the system should be used and the staff has been trained to follow the desired procedures. There are also manuals that solidify the desired practices. For the most parts, the working practices have been assimilated by the salespeople. However, according to the interviews, the desired working practices are still not crystal clear to at least one of the salespeople.

Moreover, despite the efforts of trying to make the users of the CRM software aware of the desired working practices, it has not been a complete success. While majority of the salespeople find the new working practices superior to the ones they used pre implementation, at least one of the salespeople finds it difficult to adjust to the new working practices and rather would favor the old way of doing things.

Solidifying working practices is one of the most crucial factors in CRM software implantation and there are two phases to it. First of all, it is important, that a company plans and sets clear working practices for systematic use of the system. Secondly, the company needs to make sure that the working practices are followed by the users of the system in order for the company wide usage of the system to be effective. If some of the users of the CRM system don't use it, in the desired way, it is likely to have an effect on the benefits of the whole CRM system as it means that some of the customer information is not in the system, or at least not in the system, the way they are supposed to be.

3.5.6 External assistance

The external assistance is especially important for companies, with low level of IT skill in-house. This was the situation also for the case company as in the beginning of the adoption process the level of in-house IT skill was very limited. As the different CRM software was considered and many CRM vendors had kept their presentations and tried to sell their systems to the company. The CEO of the company couldn't make a decision only based on his own opinion and external assistance was brought in to help in the adoption process. At first, the external assistant was helping the company with the CRM software selection and determination

of requirements as well as some other development projects in the company. However, pretty soon the external assistant became internal as he was hired to the company full-time and took on the position of development manager.

This addition to the company was very beneficial in terms of finding success in this type of IT implementation process. The DM has worked with many CRM software implementation projects during his career, most of them for large companies. This meant that, the company now has that high level IT skill in-house and it doesn't have to rely on external assistance nearly as much as it otherwise would. Bringing that new person to be in charge of the CRM system has likely had a positive effect also on the salespeople of the company.

Whenever there is a problem with the CRM system, the salespeople first turn to the DM to solve any technical issues or working practice related issues. The issues can usually be solved by the DM directly. If the DM can't solve the issue at hand by themselves and needs to contact the CRM software service for example, it is beneficial that the contact person within the company possesses high IT skill and is very aware of the logics behind these kinds of software and understand what needs to be done in order to solve any issues.

“Whenever there is a technical issue in the CRM system, the DM has been able to solve the issues. Lately there haven't been many technical issues in the system” – Salesperson

Despite the improved situation in terms of in-house IT skill, it didn't mean that the company could implement CRM software without external assistance. With the help of newly acquired development manager the company management was able to decide, after reviewing multiple different software, the CRM system it wanted to implement. After the decision, the company hired a consultant company to set up and tailor the system according to the initial requirements of the company. The setting up of the CRM system took around one week to complete. Within the week, the consultants tailored the system to answer the determined requirements of the company. After using the consultant company to set up and perform the initial tailoring, the company has not been in need of external consultancy regarding the CRM system.

The development manager has been able to further tailor the system by doing small scale adjustments to the system based on the experience of the users after the implementation of the system. The CEO however contemplated that external assistance might be needed in the near future in order to change the quote giving process of the company to run through the CRM system as explained in the previous section 3.5.5.

External assistance is important in order to successfully implement a CRM software especially in the SMEs where there usually is low level of IT skill in-house. The company in this case has used external assistance in order to tailor the CRM system to the desired form in the early stages of the implementation. The company had its in-house IT skill significantly elevated with the hiring of the development manager. This has meant that the company is not so much reliable on external assistance as there are in-house capabilities to solve some of the issues. Overall, external assistance has been used when needed and it has been helpful in the implementation of the CRM system.

4 Discussion

The objective of this thesis is to identify the critical success factors in CRM software implementation in SMEs. As described in the beginning of the literature review, the CRM adoption process consists of decision to adopt, software selection and implementation of the software. The main focus of this study is on the implementation phase of the process. However, the software selection is an essential part of the implementation of the CRM software, so it needed be included in the study in order to make it comprehensive. Furthermore, some of the critical success factors that are drawn from the literature are directly involved with the software selection phase of the process. It would be difficult to study the implementation without including the software selection into it. Therefore, it can be seen that the critical success factors that are introduced in this study relate to the CRM software selection as well as the actual implementation process of the selected software.

In this section the case study will be summarized regarding the successfulness of the CRM implementation. Furthermore, the factors that have affected the successfulness of system implementation in the company will be discussed and combined into one coherent section. After that, the research question and objectives will be addressed in order to assess whether or not they have been fulfilled.

4.1 The successfulness of the CRM software implementation and the software selection in the case company

4.1.1 Software selection

The successfulness of the software selection in the case company was evaluated by analyzing how well the implemented system was able to realize the desired features of it. The CRM software selection has been successful in the case company overall. The system is easy to use according to the management and the salespeople of the company. The system is capable of performing all the desired actions and possesses the desired features that the company had set for the system. While most of the users stated that some of the features in the system may not be very logical in the beginning, all users agreed that after using the system for a while, they

became comfortable to use any features they needed to use in the system. While, the software may initially seem somewhat frightening to users with low IT skills, eventually after having used the system for a while it becomes easy for them as well.

As the level of IT skills of some of the users of the system in the case company is low it was important for them to find a solution that is easy to use. It can be said that they have successfully done so. Also, the software offers more features than the company required prior to the implementation. Some of the features are already in use and some of them might be implemented soon. Overall, the software selection has been successful in the case company as the system is compatible with the requirements as well as the desired legacy systems.

4.1.2 Implementation

The successfulness of the CRM software implementation was evaluated by analyzing how well the goals and expectations from the system had been realized after one and a half years after the launch of the system. Overall the implementation can be said to have been successful as the management and most of the salespeople have been reviewed the system to be good and essential in their work. However, not all the goals and expectations from the system have been completely met.

The goal of *creating a centralized database of customer intelligence* has been successful. Management and most of the salespeople feel that the system is superior compared to the old way, where the customer information was scattered around in salespeople's notes, minds or some other places. While generally the system has been successful in generating a centralized database of customer intelligence, sometimes the customer information is not completely timely or accurate. It is humane that sometimes someone forgets to enter information into the system for example and it is difficult to avoid that. However, if this happens due to some user's negative attitude toward the system, then it is much more concerning as if the information in the system is systematically not accurate or timely it diminishes the benefits of the system significantly.

The goal of the system working as a *tool that identifies customs and general information about customers* has been unsuccessful for the most parts. The users enter the timely customer activities into the system well but the general information about specific customs or pricing, for example, is largely missing from the system. It is understandable that in the beginning when the system was launched, most of the focus was on the everyday usage of the system and it was crucial that it got rolling. However, now, one and a half years after the

implementation in a situation where the system has established its position as an everyday tool it would be beneficial to start entering the essential general customer information into the system. This would further enhance the system to be the one database where all the essential customer information is available.

The essential reason for why the customs and general information about customers has not been input in the system is because the management has not been pursuing the salespeople to add that information into the system. As mentioned, the transition for the salespeople to start using the CRM system has not been without issues and it has required significant effort to change their working routine from the old ways to the new way where the CRM system is in the middle of their everyday working practices. Therefore, the focus in the beginning has been in the everyday usage of the system and adding general customer information into the system has been left in background so that the management has not required for the salespeople yet to enter the essential general information about customers. Now that the salespeople are familiar with the system, it should be brought out and the users of the CRM system should start entering the general customer information into the system to make it a more comprehensive tool for the company.

The goal of establishing the system as a *tool that helps the salespeople in everyday business practices* has been successful for the most parts but not entirely. This is due to the fact that even though all the salespeople of the company use the system, not all agree on the benefits of the system in their own working practices. While most of the salespeople feel that the system helps the management and also the salespeople in their everyday work, not everyone feels so positive about it. The issue is that, if a user feels that the system is not beneficial in their work and that it is disturbing them, it becomes likely that the user neglects using the system in the desired way. Therefore, reducing the company wide benefit of the system. The reasons why some of the salespeople are still resisting the CRM software are further discussed in the following chapter 4.2.

The goal of having the system *work with legacy systems* has been successfully completed. The CRM system works seamlessly with the email system of the company and these are the two main software tools that the salespeople use in their daily work.

The goal of the CRM software *establishing a position as the main tool that the salespeople use in everyday work* has been successful as all the salespeople of the company are using the CRM software as the main software tool along with the email in their everyday work.

While, the attitude toward the system may not be extremely positive toward the system for all of the salespeople, all are however using it.

The CRM software has established its position as the main tool for the salespeople of the company and while doing so, it has become the centralized database of timely customer information. The system also works well with the legacy systems as desired. However, the attitude toward the system is still not completely positive for all the salespeople and a minority feel that the system has been implemented to only help the management and possible future salespeople. Moreover, not all the salespeople completely understand the benefits the system can have toward their work.

4.1.3 Evaluating the requirements, set by the company

As the successfulness of the implementation is evaluated based on the requirements that are set by the company itself, it is crucial that the requirements are well set and are compiled with good reasoning in order to get a good understanding of how successful the implementation has actually been. For example, if the requirements are set very low, a company is able to fulfill them and make it seem as the implementation has been successful. When in fact that may not be the case as the requirements are unjustly set. Moreover, determination of requirements is identified as one of the critical success factors in successful CRM software implantation in this thesis and the successfulness of them is discussed further in the sections 3.5.4 and 4.2 of the thesis.

In the case company, the requirements were well thought of before the implementation began. The company had set up specific features that the software should possess so that it would work well in that specific company. For example, it was crucial that the software is easy to use as the company salespeople generally lack high IT skills. One aspect that was missing from the desired features of the system was the management tools. It is clear that the management tools of the system have been well received by the management of the company and that they are an important part of CRM software as they enable the management to benefit from all the data that is input into the system by providing them with relevant analytics and status reports. Therefore, a CRM system with bad management tools would definitely be less useful for the management of the company than a system with good management tools and consideration of the extent to which they are needed should have been included in the desired features of the system.

The goals and expectations of the system and how the system would improve the working practices and efficiency within the company were justified and they showed understanding of the possibilities of the software as well as the needs of the company.

4.2 Critical success factors of CRM implementation in the case company

In this chapter, the critical success factors drawn from the literature and how critical they were towards successfulness of the implementation in the case company are discussed.

Management support and involvement was very evident in the CRM software implementation in the case company. The management was handling the specifications, software selection as well as the actual implementation of the software. It also distributed the required resources for the implementation. The management support and involvement is crucial in order for CRM software to be implemented successfully in SMEs and it is difficult to imagine any situation in SMEs where a CRM implementation would be successful or even any way possible without the management support or involvement as SMEs are so heavily centered around the management. This factor was critical for the successfulness of the implementation in the case company, similarly to how it was presented in the literature.

The *System compatibility* was successful in the case company as the system fulfilled the requirements that were set to it. The system was also compatible with the needed legacy systems of the company. This compatibility factor definitely made it possible that the implementation was successful for the most parts. Should the system have been unable to fulfill the requirements that were set to it by for example being difficult to use, it is very likely that the successfulness of the implementation would be significantly worse. Overall, it might be possible to successfully implement a CRM software that was not completely compatible. However, the system compatibility should be considered critical to the successfulness of the implementation as by being compatible, the possibility to have successful implementation should grow significantly compared to implementing an incompatible system. The case implementation is concurring with the literature about the criticalness of system compatibility toward successfulness of CRM software implementation.

The *Involvement of end users* was short from complete in the case company implementation. The end users were involved mostly in the later stages of the implementation

when the software specifications and selection had been completed. End users' input was listened to especially regarding the working practices of the system but not so much about the specifications of the system in the early stages. The level of IT skills within the end users of the company was relatively low especially for some of the users, therefore it could be expected that there would occur some kind of resistance from them as they would have to start using a seemingly complicated software. By including the end users more in the early stages of the implementation it would be possible that the resistance would have been lower by the time the system was launched and the salespeople attitude toward the system would be better now.

From the interviews with the salespeople, it was clear that all of them started feeling more positive about the system once their input was listened to about having to enter only the essential information into the system as oppose to the original idea where basically every single activity would have to be entered into the system. Similarly, had the end users been involved in the early stages of the implementation it is possible that they would feel more positive about the system once they feel that they are part of the team, trying to find a solution for better working practices. Furthermore, by involving the end users, it is possible to get good ideas from them regarding the implementation. Moreover, involvement of end users is a good way to reduce the resistance toward a CRM implementation and in cases where resistance is expected, for example when the end users have low IT skills, it might be very beneficial to include them in the implementation as much as possible. In SMEs especially it is possible to usually involve the end users more when there are not so many of them. To summarize, involving the end users is a good way to reduce the resistance toward the implemented system, therefore, in cases where resistance is expected, doing so may prove critical toward the successfulness of the CRM software implementation.

Another factor that is critical in successful CRM implementation is user training. This factor was drawn from the literature as a critical success factor of CRM implementation as part of the end user involvement and in the interviews with the salespeople of the case company, user training was brought up. One salespeople suggested that if a company has users of the system that possess different IT skills it would be useful to train them separately as the higher IT skilled users expectedly learn to use the system quicker than the one with lower IT skills. By training them the same way it can be frustrating for the lower IT skilled users when they don't learn the system as quickly as the higher IT skilled users and the other way around. Additionally, it is crucial to train the users so that they become familiar with the system and are able to use it efficiently as well as understand how the system will be beneficial for them.

For the case company, it seems that the user training has been more effective to some users than other. This could explain the differences in attitude toward the system as the users with lower skills with the system feel like the system doesn't provide much benefit to them while most of the users feel that the system is easy to use and beneficial for their work. Therefore, additional training for the users that are struggling with the usage of the system should be beneficial for the company as it is crucial that all the users are capable of using the system so that it will benefit their work.

The *determination of requirements* was well handled in the case company. The company set up specific requirements by setting strategic goals and expectations for the system as to how and what business aspects it would improve. Similarly, the company had well specified features that they require from the software in order to able to find one that would fulfill those requirements. In order for a CRM software implementation to be successful it is crucial to determine the requirements of the system before selecting the software and beginning the implementation. Determining the requirements is like planning the implementation, doing so means that the system will be implemented to tend to specific needs. By determining the requirements, it is possible to make an informed selection of which software to select in order to meet the requirements. If the requirements are not well determined, the implementation is more random and making random business decisions is usually not successful in the long run. Therefore, it is critical to determine the requirements of the software features as well as goals and expectations that the system should meet. Doing so, increases the chances of successful software implementation.

Solidifying working practices was well covered in the case company and the it has established clear procedures on how the CRM software should be used. To emphasize the procedures, the company has created manuals for all of the users to see. This accentuates, that the working practices are planned and fair as everyone is expected to use the system according to the deigned working practices. Solidifying working practices is crucial in order for a CRM system to be used effectively. For example, naming sales opportunities or projects into the system needs to be done according to fixed instructions as without doing so it would become difficult after time to find the desired profiles from the system. Making sure that all the users follow the designed working practices is also essential and the users need to be trained so that they are aware of the desired working practices. Moreover, solidifying working practices is very critical in order for CRM software implementation to be successful.

External assistance was used in the case company quite limitedly as there was no need to do so after hiring the high IT skilled development manager. The initial tailoring of the system was done with the help of external consultancy company. But the other adjustments to the system have been handled in-house. However, if a company doesn't have high IT skill expertise in-house, the role of external assistance would raise significantly. Furthermore, it is extremely difficult to imagine an SME to implement a CRM system successfully without external assistance especially, if the in-house IT skills are low. In other words, the less IT skill in-house a company has, the more it needs to rely on external assistance to successfully implement a CRM software.

4.3 Revisiting the research objectives

The research objectives of this thesis were:

1. *Describe the critical success factors of CRM software implementation in SMEs based on the current academic literature.*
2. *Evaluate the successfulness of the CRM software implementation in the case company*
3. *Describe the factors that have been affecting the successfulness of the CRM implementation in the case company.*

The first objective was accomplished in the literature review section 2.5 *Critical success factors for CRM implementation in SMEs*. From the current academic literature six distinct factors for successful CRM implementation were identified. The factors were management support and involvement, system compatibility, involvement of end users, determination of requirements, solidifying working practices and external assistance.

The critical success factors identified from the literature were used as a theoretical framework for the case study section as these factors were studied in an actual CRM implementation in a small company to see how well the findings from academic literature held true in an actual business case.

The second research objective was accomplished in the sections 3.3 *The goals and expectations of the CRM system* and 3.4 *Software selection*. The software selection was successful in the case company as it very much met the expected requirements that were set to it and the management and salespeople of the company have found little criticism toward the software itself. The successfulness of the actual implementation however, is not as unanimous. Some of the goals and expectation from the system are not completely met and minority of the

salespeople feel that the system is not really benefitting their work. Regardless of these setbacks, the implementation of the CRM software has generally been very positive experience for both the salespeople and management of the company.

The third research objective is accomplished in the section 3.5 *The implementation phase*. In here, the factors that have been identified from the literature are described in the case company implementation. Any additional factors that would have been critical in the case company implementation were not discovered during the study. However, the importance of user training was emphasized. User training was discovered also in the literature review as part of the end user involvement. Moreover, user training could be seen as a separate factor, from the end user involvement, critical towards the successfulness of CRM software implementation.

Moreover, from the six factors that were considered critical in successfulness of CRM software implementation, four were very much present and well handled in the case company's CRM software implementation. Management support and involvement, system compatibility, determination of requirements and solidifying working practices were all present and all of these can clearly be seen as having been critical in the successfulness in the CRM software implementation in the case company. The external assistance was not very heavily relied on as the level of IT skill in-house in the management is high, therefore, the external assistance has not played such critical role in the implementation for the case company. This doesn't mean that it could be suggested that external assistance is not important as especially for the companies with low IT skills in-house it can be very critical toward a successful CRM software implementation. End user involvement was used in the company mostly for adjusting the working practices and not so much in the early stages of the implementation for system specification for example. With low IT skill end users, resistance is expected for this kind of implementation. Therefore, involving the end users in the early stages might have been beneficial for the company as it should lessen the resistance. The salespeople's initial attitudes toward the system were not very positive but most of the salespeople have already been realizing the systems benefits and are content to use the system. However, for minority of the users, the attitude towards the system hasn't changed to positive yet. Therefore, by involving the end users from the very beginning the attitudes might by now already be more positive also for those that currently fail to see the benefits of the system.

The case study of this thesis has further strengthen the role of the six critical success factors of CRM software implementation in SMEs that were gathered from the academic

literature but it has also separated user training as its own factor, as in the literature it was comprehended as part of end user involvement. Additionally, it has been especially noticed that the role of external assistance is largely based on the IT skills of the management of the company that is about to implement the CRM software. External assistance is critical in successful CRM software implementation in SMEs, however the extent to how critical it is, depends on how skilled in IT the managing staff that is implementing the system in the company is.

5 Conclusions

Successful implementation of CRM software can be very beneficial for a company as the benefits of CRM software are widely recognized. However, it is not unusual for an implementation to fail. Therefore, it is important to study what are the factors that a company should execute in order to increase the chances of succeeding in the CRM software implementation. Furthermore, CRM software are nowadays implemented more also by SMEs rather than just large enterprises which has been the case earlier. Academic literature relating to IT implementation has traditionally been focused on ERP or other systems, usually not CRM software. Additionally, majority of the literature is focused on larger enterprise IT implementations rather than SMEs. There are some significant differences in IT implementation between large enterprises and SMEs. Most notably, SMEs are very centered around management, they have a scarcity of resources and usually possess low level IT skill in-house.

The aim of this study was to identify the critical success factors of CRM software implementation in SMEs. This was done by reviewing the academic literature in order to build a theoretical framework of CSFs. The critical success factors were then evaluated in a real business case of a small company that had implemented a CRM software one and a half years ago. By studying the CSFs of CRM software implementation both by reviewing the academic literature and the case study, seven distinct CSFs in CRM software implementation for SMEs can be brought up: *Management support and involvement, system compatibility, involvement of end users, determination of requirements, solidifying working practices, external assistance and user training.*

The initial theoretical framework consisted of six CSFs as the user training was included in the end user involvement. But after the case study, it seems reasonable to pick user training as its separate CSF as it is a critical part of the successfulness of CRM software implementation and is independent of involving the users in the implementation process for system specification for example. Furthermore, the end users can be involved in the implementation well without training the users enough and vice versa.

The critical success factors that were identified from the literature, were all seen critical also in the case study. Management support and involvement is crucial for CRM software implementation to be successful especially in SMEs where the companies are so heavily

centered around management and they hold so much power within the companies. System compatibility is crucial as by implementing a software that meets the requirements, set toward the system, the implementation is much more likely to succeed.

Involvement of end users is important as by doing so, it is possible to get valuable input from the end users throughout the implementation process. Even more importantly, in companies with high chance of resistance toward the system it can prove crucial to involve the end users as it is likely to reduce resistance should the users feel that they are part of the team that is implementing a system that will benefit the users. Companies with low level of end user IT skill are typically more likely to encounter resistance in an implementation of seemingly difficult system. Moreover, involving the end users in small and medium companies can be easier to realize as there are less end users than in larger enterprises.

Determination of requirements is crucial as it promotes the strategic approach to the CRM software implementation. It should be clear for the company before it selects a software and starts implementing it, what it is exactly that they wish to achieve by implementing the system and what are the specific features that the software should possess. Solidifying working practices is crucial as using the system effectively means that all of the users know how they are expected to use the system and follow set guidelines. Without solidifying the working practices, the information in the CRM system is not coherent and that benefits gained from the system are diminished.

External assistance was not used significantly in the case company as the company management possesses high level IT skill. Furthermore, as pointed out in the literature review, the less the implementing company possess in-house IT skill, especially in the team that is executing the implementation, the more it needs to rely on the external assistance. Sufficient user training is crucial as it essential that the users of the system feel comfortable with the system and understand what the system is capable of and how it helps them in their work.

The CRM software adoption process was described in the literature review as following:



Figure 4 – CRM software adoption process

The critical success factors of CRM software implementation in SMEs, that are presented in this study are related to the software selection as well as the actual implementation phases of the adoption process. Furthermore, software selection is distinctively a separate phase from the actual implementation phase but it is difficult to study the implementation without including software selection to it because it is so heavily related to the actual implementation of the software. Therefore, many of the herein presented critical success factors of CRM software implementation in SMEs are directly or partly involved in the software selection phase. Thus, it is sensible to include software selection into the CRM implementation process when considering the factors that are critical toward the successfulness of it and not try to separate the implementation from the software selection phase of the process.

The CSFs of CRM implementation in SMEs presented in this study are quite universal and should be useful for most of the small or medium companies about to implement a CRM software. It needs to be understood that every CRM implementation is different in terms of company size, needs, business field etc. and it is difficult to give any concrete suggestions about what specific software a company should acquire because it depends so steeply on the situation. However, some guidelines were introduced in the literature review on how a company might want to approach the software selection situation. Moreover, by considering these CSFs, presented in the study, and executing them well prior and during an implementation, most of the companies should be able to have more success in CRM software implementation.

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Interviews

Kari Laakso, CEO, Vitrea Oy, Helsinki, 20.4.2016

Kari Laakso, CEO, Vitrea Oy, Vantaa, 21.9.2016

Jari Mäntylä, Salesman, Vitrea Oy, Vantaa 20.10.2016

Vesa Virkkunen, Salesman, Vitrea Oy, Vantaa 20.10.2016

Riku Ruokolainen, Salesman, Vitrea Oy, Vantaa 20.10.2016

Kari Miettinen, Salesman, Vitrea Oy, Vantaa 25.10.2016

Kari Laakso, CEO, Vitrea Oy, Vantaa 25.10.2016

Petri Kasper, Development Manager, Vitrea Oy, Vantaa 26.10.2016

Kari Laakso, CEO, Vitrea Oy, Helsinki 27.10.2016

Appendices

Appendix 1 – Interview frame for the salespeople

Haastattelu CRM ohjelmiston käyttöönotosta myyjille

CRM systeemiin liittyvät kysymykset

Onko ohjelmisto helppokäyttöinen?

- Helppo ja intuitiivinen käyttöliittymä
- Yhteensopiva muitten ohjelmistojen kanssa
- Projektien hoito, tilan muuttaminen yms.
- Kontaktien (puhelut yms.) ylös kirjaaminen
- Tiedon etsiminen

Miten koet systeemin, onko siitä hyötyä? Voisiko siitä olla hyötyä

Onko joitain muita kommentteja systeemiin liittyen?

Käyttöön liittyvät kysymykset

Miten käytät ohjelmistoa?

- Kirjaatko sinne kaikki asiakastapahtumat?
- Mitä kirjaat systeemiin?
- Kirjaatko tapahtumat suoraan systeemiin vai omiin muistiinpanoihin ensin
- Puhelimella?

Jos tulee jotain ongelmia/ kysymyksiä menettelytapoihin liittyen esim. mihin mikäkin kirjataan, mitä teet?

Jos tulee jotain ongelmia/ kysymyksiä teknisiin asioihin liittyen esim. miten asiakas linkataan projektiin, mitä teet?

(jatkokysymys, jos menee kysymään, miten neuvotaan?)

Käyttöönottoon liittyvät kysymykset

Mitä mieltä olit CRM systeemistä ennen käyttöönottoa?

Kysyttiinkö käyttöönoton aikoihin mielipiteitä?

Onko tehty selväksi, miten halutaan systeemiä käytettävän?

Appendix 2 – Interview frame for the management

Haastattelu CRM tilasta johdolle

Etukäteen mainitut tavoitteet – Miten ovat onnistuneet?

- Keskitetty datatietokanta asiakastiedosta
- Työkalu josta käy ilmi asiakkuuksiin liittyviä tietoja esim. Miten tietyille asiakkaille tulee hinnoitella asioita tms.
- Myyjien työkalu jota he käyttävät päivittäisten asioiden hoitoon – onko tiedot ajan tasalla systeemissä, laitetaanko sinne kaikki asiakaskontaktit?
- Toimiiko hyvin muiden käytössä olevien järjestelmien kanssa?
- Käytetäänkö CRM:ää myyjien ykköstyökaluna vai onko heillä muita systeemejä esim. omat muistiinpanot joista tiedot siirretään systeemiin.

Oliko vaatimukset ja ohjelmiston tavoitteet hyvin määritelty etukäteen/ onko ilmennyt jotain mitä ei etukäteen osattu odottaa?

CRM systeemiin liittyvät kysymykset

Onko ohjelmisto helppokäyttöinen?

- Helppo ja intuitiivinen käyttöliittymä
- Yhteensopiva muitten ohjelmistojen kanssa
- Projektien hoito, tilan muuttaminen yms.
- Kontaktien (puhelut yms.) ylös kirjaaminen
- Tiedon etsiminen

Käyttöönottoon liittyvät kysymykset

- Kysyttiinkö käyttöönoton aikoihin mielipiteitä myyjiltä?
- Onko tehty selväksi, miten halutaan systeemiä käytettävän?

Käyttöön liittyvät kysymykset

Miten ohjelmistopa tulisi käyttää?

- Kirjaataanko sinne kaikki asiakastapahtumat?
- Mitä kirjaataan systeemiin?
- Kirjaataanko tapahtumat suoraan systeemiin vai omiin muistiinpanoihin ensin
- Puhelimella?

Jos tulee jotain ongelmia/ kysymyksiä menettelytapoihin liittyen esim. mihin mikäkin kirjataan, mitä teet?

Jos tulee jotain ongelmia/ kysymyksiä teknisiin asioihin liittyen esim. miten asiakas linkataan projektiin, mitä teet?

(jatkokysymys, jos menee kysymään, miten neuvotaan?)

Onko systeemi ollut hyödyllinen? Voisiko se olla jotenkin vielä hyödyllisempi?