Exploring the implications of the critical success factors of CRM implementation

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ABSTRACT

Customer relationship management remains an important management tool but provides highly variable levels of success once implemented. A number of critical success factors have been identified as influencing implementation success. This study provides an analysis of the impact of a range of critical success factors on customer relationship management project success. The study followed a qualitative methodology, using focus group and individual interviews, and was carried out using an interpretive phenomenological philosophy. The study shows that while a wide range of critical success factors will influence the project outcome, factors such as top management support, employee acceptance and project scoping require particular attention. Future research is suggested to include a longitudinal study that aims to verify and build on the recommendations made.

KEYWORDS: Customer relationship management, critical success factor, CRM implementation, phenomenology, CAQDAS

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LIST OF ABBREVIATIONS

Term	Definition
B2B	Business to Business
CAQDAS	Computer Aided Qualitative Data Analysis Software
CRM	Customer Relationship Management
CSF	Critical Success Factor
ERP	Enterprise Resource Planning
IT	Information Technology

CHAPTER 1

1. NATURE AND SCOPE OF THE STUDY

1.1 INTRODUCTION

In a tightening economy it is critical that companies adopt an effective customer-focused marketing strategy to retain and even grow their customer base. This is particularly relevant in service industries, where individual customer interaction must logically have a significant influence on levels of customer satisfaction. Maintaining a consistently high level of customer satisfaction requires all departments and all levels of an organisation to follow a methodical and carefully constructed approach to managing the customer interaction process. One option available to help an organisation bring about this structured approach is the adoption of a customer relationship management (CRM) strategy (Kim & Mukhopadhyay, 2011:625).

A central concept of CRM is the need to balance the long-term relationship with the short-term transactions. Managing customer relationships needs to recognise the dynamic nature of the relationship, particularly as this relationship moves into the longer term and relies on a greater level of interdependence between the organisation and the customer. CRM tools can be used to track these changes and highlight the corresponding actions required to support each stage of the relationship (Lindgreen *et al.*, 2006:58). Furthermore, both Garrido-Moreno and Padilla-Meléndez (2011:437) and Josiassen *et al.* (2014:130) confirm strong literature support for the focus on retaining existing customers through the development of long-term relationships, while CRM has brought about a shift in marketing from a transactional focus to one of relationship marketing (Hyun & Perdue, 2017:73).

Definitions of CRM abound. Ahearne *et al*. (2012:117) cite Zablah *et al.* as having identified 49 definitions of CRM, indicating the wide-ranging views and perspectives on the subject. In line with accepting that CRM needs to be adopted as a company-wide strategy, the definition preferred is that of Sin et al. (2005:1266), which defines CRM as “a comprehensive strategy and process that enables an organisation to

identify, acquire, retain, and nurture profitable customers by building and maintaining long-term relationships with them." The adoption of a CRM strategy is by no means a new concept, having been "in vogue for the past two decades and considered a part of marketing's new dominant logic" (Ahearne *et al.* 2012:117). This is supported by Ali *et al.* (2013:391), who contend that there has been a significant growth in the installation of CRM systems over the past 30 years, with CRM being at the core of supporting strategies around customer service and the focus on meeting customers' needs. Isfahani *et al.* (2014b:377) go so far as to suggest that research supports the view that CRM has led to the restructuring of contemporary marketing and has itself become a new field of practice within this domain.

Given the strong support for CRM as a key part of marketing and business, it is not surprising that CRM has been recognised as one of the leading management tools adopted in organisations around the globe. Table 1.1 shows the relative rankings of major business management tools in terms of global and regional usage, according to a 2015 survey by Bain and Company (Rigby & Bilodeau, 2015).

Table 1.1: Most commonly used management tools in 2015

	Global	N. America	EMEA	APAC	L. America
Customer Relationship Management	1	4	1(t)	2(t)	4
Benchmarking	2(t)	2(t)	1(t)	14	2
Employee Engagement Surveys	2(t)	1	5	8	9(t)
Strategic Planning	2(t)	2(t)	9	5(t)	1
Outsourcing	5	6	3(t)	5(t)	9(t)
Balanced Scorecard	6(t)	7(t)	3(t)	15(t)	3
Mission and Vision Statements	6(t)	5	8	18	5
Supply Chain Management	8	7(t)	10	2(t)	13(t)
Change Management Programs	9	9	6(t)	21	9(t)
Customer Segmentation	10	14(t)	6(t)	12(t)	7
Core Competencies	11(t)	10	–	7	–
Big Data Analytics	11(t)	–	–	1	–
Total Quality Management	11(t)	–	–	4	–
Satisfaction and Loyalty Management	16	–	–	9	–
Digital Transformation	19(t)	–	–	10	–
Business Process Reengineering	15	–	–	–	6
Strategic Alliances	17	–	–	–	8

Note: (t)=tied

Source: Bain and Company (Rigby & Bilodeau, 2015)

Despite CRM being viewed as a viable marketing strategy, it would appear that many projects do not yield the results that are expected. Rigby *et al*. (2002) quote the Gartner Group, a well-known technology and research firm, as claiming that 55% of all CRM projects do not produce results. It would appear that the trend has continued over the past decade, with Steele *et al*. (2013) indicating rates of dissatisfaction with CRM project outcomes of between 52% and 75%. With the increasing number of failures being reported, it has been suggested that these failures are less to do with technological issues, but instead involve broader business, social and cultural issues (Ali *et al.*, 2013:391). These findings highlight the need for a focused and structured approach to the adoption of any CRM strategy implementation. While a number of recommended approaches to implementation are available, the 14 Critical Success Factors (CSFs) proposed by Eid (2007:1030–1031) appear to have general applicability and will be used as the basis for this study. These 14 CSFs are:

- top management support
- organisational culture
- a clear CRM strategy
- a clear project vision or scope
- benchmarking
- employee acceptance
- software selection
- integration with other systems
- training
- a realistic implementation schedule
- performance metrics
- personalisation
- customer orientation
- data mining

The focus on the use of CSFs to support CRM implementations has received good support in research literature, with Huang *et al.* (2013:1220) and Shaul and Tauber (2013:2) confirming this approach as being an effective and widely adopted means of addressing the many challenges that organisations face when confronted by project

implementations of this nature. The concept of CSFs was first developed as an information management tool. A CSF is defined as

“For any business, the limited number of areas in which results, if they are satisfactory, will ensure successful competitive performance for the organisation. They are a few key areas where’ things must go right’ for the business to flourish. If results in these areas are not adequate, the organisation’s efforts for the period will be less than desired.” (Rockart, 1979).

This research study will explore the implications of attended to each of the 14 CSFs and how these might impact on CRM implementation success.

The rest of this document presents the scope of the research study in Chapter one and is followed by a review of available literature covering each of the 14 CSFs in Chapter two. Chapter three provides a detailed description of the research design and methodology with the results and discussion presented in Chapter four. Chapter five completes the document with conclusions and recommendations.

1.2 PROBLEM STATEMENT

It is accepted that a CRM implementation can bring about a competitive advantage, but many CRM projects fail to achieve the desired results. The literature suggests a number of factors that can be used to measure the success of a CRM project, but it appears limited attention has been paid to what the practical considerations may be to support or detract from successfully addressing each of these success factors. The problem being addressed in this case study is therefore using the experiences of individuals exposed to CRM implementations to uncover the practical considerations that may help or hinder a company’s CRM implementation project using the 14 CSFs outlined in Eid (2007:1031–1032). The core research question is therefore: “What are the practical considerations involved in aligning a company’s Customer Relationship Management implementation project with the 14 Critical Success Factors identified by Eid (2017:1030)?”

1.3 RESEARCH OBJECTIVES

By making use of a software company that is currently implementing its own CRM strategy, and having experience as a technical partner in the implementation of CRM packages in other companies, it is the intention of this study to gain insights into the challenges posed by using CSFs in order to improve CRM project implementation success and to identify the practical actions that can be taken to contribute to a more effective project implementation. The research objectives are discussed in the remainder of this section.

1.3.1 Primary research objective

The primary research objective of this study was to identify the challenges that might be faced in addressing each of the 14 CSFs identified by Eid (2007:1031-1032), in the implementation of a CRM project.

1.3.2 Secondary research objectives

The secondary objectives of the study will be:

- To identify the actions an organisation can take to meet the challenges identified in addressing each of the 14 CSFs.

- To identify relationships between the CSFs and how this might affect a CRM implementation.

- To confirm the relative importance of all 14 CSFs to one another in terms of their influence on CRM implementation success.

- Prepare a priority driven checklist of actions that an organisation should take in order to effectively apply a CSF approach to CRM implementations.

1.4 IMPORTANCE AND BENEFITS OF THE PROPOSED STUDY

The implementation of a CRM strategy requires a significant investment, not only in financial terms but also in terms of employee morale and reputational risk. While a

successful implementation provides the potential for improved customer retention and sales, an unsuccessful project may leave an organisation worse off than if they had merely maintained the status quo. The decision to embark on a CRM strategy needs to be made together with consideration of the practical factors that will give the project every chance of success. Garrido-Moreno and Padilla-Meléndez (2011:438) identify the continuing need for further research into areas such as barriers to the successful implementation of CRM, while Eid (2007:1037) suggests that his recommended CSFs be developed into “an index of practice” to allow companies to monitor performance on a time-based approach. It is hoped that this study will contribute to identifying these practical factors to assist organisations improve the likelihood of being successful in the adoption of a CRM strategy, with an emphasis on the implementation of a CRM system. As suggested by Corley and Gioia (2011:15), building theory should strike a balance between creating theoretical originality and utility. While it is expected that this research will make an incremental contribution in terms of originality, it is hoped that it will also be practically useful. Corley and Gioia (2011:27) note that it is wise to “choose our theories according to how useful they are, not how true they are”.

The rest of this chapter gives an overview of the research project by describing the research design and the research methodology together with the scope of the study and the major assumptions. The research design discusses the philosophical framework within which the research was undertaken. It also discusses the sample, how data was collected and how the data was analysed.

1.5 RESEARCH DESIGN

In line with the research aim of uncovering practical reasons for the success or failure of CRM implementation through the experiences of those having gone through the process, a qualitative research methodology was used in this study within the philosophical framework of interpretivism. In particular, in using the lived experiences of the participants in the study as the source of data, a phenomenological methodology was adopted.

1.6 SAMPLE

The study made use of the employees of a purposively selected CRM software reseller that not only offers CRM support to clients, but has also embarked on its own CRM strategy over the past six months.

1.7 DATA COLLECTION

Data collection was in the form of one focus group followed by 12 face-to-face in-depth interviews and one telephone interview, using a semi-structured interview question approach. The intention of the questions was to encourage participants to describe their experiences and to interpret those experiences in terms of both their own CRM implementation and the experiences they had gained through their interactions with other clients. All interviews were electronically recorded, and demographics and general participant responses to the process were noted. All electronically recorded interviews were transcribed into Word documents for further analysis.

1.8 DATA ANALYSIS

Data was analysed through a process of data reduction in the form of coding, and was followed by the development of sub-themes and/or themes by interpreting the meaning behind the selected participant comments. Relationships between sub-themes and themes were identified to consolidate the findings in order to best answer the research question. Computer aided qualitative data analysis software (CAQDAS) was utilised to analyse data and to provide an audit trail of the analysis.

1.9 SCOPE OF THE STUDY

The research used the collective knowledge and experience of the staff of a CRM software reseller that offers implementation support to its clients. The company has also embarked on its own CRM strategy. The study therefore explores the views of a sample of employees from the selected organisation, making use of their insights, not only those which are applicable to their own CRM implementation but also those they have gained by assisting in the implementation of CRM software packages in other organisations. Discussions focused on the 14 CSFs of Eid (2007:1030) but allowed latitude to expand discussions to other factors, should these be deemed to be relevant to the participants.

1.10 MAJOR ASSUMPTIONS

A key assumption in this study is that the CSFs developed by Eid (2007:1030) for the banking industry will find general applicability in the IT services company engaged in this study. It is further assumed that the participants in the study have sufficient knowledge of the subject to form an opinion on the matter being investigated. Finally, it is assumed that the researcher's interpretation of the participants' comments will be a true reflection of the meaning behind those comments.

1.11 LAYOUT OF THE STUDY

The research report is structured in five chapters with the details as follows:

Chapter One: Nature and scope of the study

This chapter provides the background to the study which leads to the problem statement and the research objectives. Definitions are provided for the key elements of the study together with the scope of the project. An outline of the research methodology and the major assumptions is also discussed.

Chapter 2: Literature review

This chapter reviews available literature with regards to the 14 CSFs analysed in the research. The chapter is structured so as to provide detailed background to the origin of the 14 CSFs as well a review of each CSF in their own rights.

Chapter 3: Research methodology

This chapter takes the reader through the detail of the research methodology and uses a review of the available literature to underscore the approach taken. Details are provided on methods used to select the population and sample for participants, as well as the methods for data collection and analysis. The quality and rigour of the research design is discussed together with ethical considerations for the study.

Chapter 4: Results and discussion

This chapter presents the results of the interview data analysis making use of hierarchical charts to show the themes identified. The results are discussed under each of the 14 CSFs.

Chapter 5: Conclusion and recommendations.

This final chapter presents the conclusions from the study together with recommendations for applying the results of the research. Research objectives will be assessed while the management implications of the study and suggestions for future research will be presented.

1.12 CHAPTER SUMMARY

This chapter provides the background to the study together with the research objectives and the importance of the study. The outline of the research methodology is provided showing a qualitative methodology using an interpretive phenomenological philosophy. The research design is expanded to show the sample population chosen as well as the process for data collection through focus group and individual face-to-face interviews. The layout of this report is provided. The next chapter will present the findings of the literature review.

CHAPTER TWO

2. LITERATURE REVIEW

2.1 INTRODUCTION TO CRM

Customers ultimately remain at the heart of why businesses exist, and in today's technologically advanced environment the manner in which an organisation manages its customer base is critical to maintaining a competitive advantage. Customer information is now more readily available and more readily disseminated and provides a business with a more complete view of every customer and the opportunity to personalise the level of service offered to the customer base. Developing a strategy to effectively manage customer interactions is key to remaining competitive. One such strategy is that offered by CRM (Ganesan *et al.*, 2012:117).

Boulding *et al.* (2005:156) propose that CRM is the outcome of a continual process of evolution and integration of marketing ideas and newly available data, technologies, and organisational forms. As with many business concepts, Boulding *et al.* believe that the process of evolution within the CRM domain will continue in response to demands from market challenges. It is their belief that a critical component of CRM is the need to develop value for the customer and in return generate long-term value for the organisation.. Payne and Frow (2005:167) note that while customer relationship management originally placed strong emphasis on technology, the concept has evolved into one providing a much more holistic view of customer management. Boulding *et al.* (2005:157) confirm the link between customer satisfaction and improved company performance, and while there is evidence to the contrary they note that CRM practices can bring about improved company performance. They believe CRM has wide applicability.

It is therefore suggested that CRM will continue to play an important role in the future of business, and organisations that have not yet successfully implemented a CRM strategy would do well to consider its potential. Recent advances in mobile technology have led some to believe that CRM will continue to play a key role in managing the customer interface (Burns, 2013). Having said this, CRM is not without its detractors. CRM systems, as part of the broader Enterprise Resource Planning systems, are

prone to budget overruns and often considered to be failures. Primary areas of failure are in leadership, organisational and company culture issues, people issues and technological issues (Shaul & Tauber, 2013:2).

In a wide-ranging study of research literature, it has also been noted than on more than half of the occasions when CRM strategy failures were recorded, organisational factors were the major issue as opposed to a lack of CRM skills (Mendoza *et al.*, 2007:913). Issues around CRM implementation are complicated further by the different approaches required when considering business-to-business (B2B) relationships, as opposed to business-to-customer relationships, with the former requiring a comprehensive record of inter-organisational communications (Isfahani *et al.*, 2014b:378). It therefore becomes critical to understand what makes for a successful CRM implementation to ensure that an organisation does not commit valuable resources to a project that might otherwise fail to deliver a return on its investment.

Research literature further confirms a range of factors that may influence the outcome of a CRM strategy. In a study of a major bank in India, Das and Dasgupta (2009:4) set out to identify the bank's CRM best practices. After identifying 140 potential best practice statements, this list was reduced to 29 CRM best practices that the authors felt could apply to the retail banking sector. While the best practices offer an indication of what should be achieved through the implementation of a CRM strategy, it is the actual implementation process itself that appears to be key to the success or failure of the strategy. A number of authors confirm the need to address issues around processes, people and technology in terms of establishing an appropriate strategy (Mendoza *et al.*, 2007:915; Garrido-Moreno *et al.*, 2014:1031; Rahimi & Gunlu, 2016:95).

The benefits of a successful CRM implementation revolve around factors such as the impact of the initiative on customer retention rates. Acquiring new customers is estimated to cost approximately five times as much as maintaining existing customers, and therefore maintaining customer relationships must be considered a cost-effective approach to marketing. CRM is targeted at optimising long-term customer value by

aligning an organisation's processes, marketing and customer service with maintaining the customer relationship (Hsin Hsin, 2007:484).

The rest of this chapter will present the background to the identification of the 14 CSFs used in this study together with an in-depth literature review of each of the same CSFs. A conclusion to the literature review is provided.

2.2 EID AND A CRITICAL SUCCESS FACTORS APPROACH

While a number of recommended models for implementation are available, the CSFs approach proposed by Eid (2007:1030) appears to have general applicability. In his study Eid notes a high level of theory evident in literature which supports the potential for CRM success, but notes a lack of research conducted to provide for a more direct measure of the real impact of CRM. In identifying this gap in the literature, Eid set out to make use of IT literature and current relationship marketing theory to develop a conceptual model for CRM implementation.

A key component of this model is the identification and assessment of CSFs that impact on a CRM implementation. Eid notes that it is important to identify these critical factors to ensure that CRM benefits can be fully realised and, importantly, to ensure that failures can be avoided. Making use of the responses to a questionnaire sent to a number of banks, Eid identified 14 CSFs that were shown to be statistically significant in their influence on CRM effectiveness or CRM success. All banks in this study had implemented a CRM system at least one year earlier. Using exploratory factor analysis, Eid identified five strategic factors (top management support, organisational culture, developing a clear CRM strategy, clear project vision/scope and benchmarking), four tactical factors (employees' acceptance, CRM software selection, integration with other systems and training) and five operational factors (realistic CRM implementation schedule, enterprise performance metrics for CRM, personalisation, customer orientation and data mining) that were considered the most relevant variables in measuring CRM success. Eid chose customer retention as a measure of CRM success. It is generally recognised that an increase in customer retention can significantly improve company profits (Eid, 2007:1031-1037).

While Eid's study focused on banks, other research has shown a strong match with the factors identified by Eid, albeit with slightly different wording. In a study of over three hundred different reports of CRM project results, eight out of the top ten factors identified match those identified by Eid (Ahmad, 2012:223). One aspect of the proposed "index of practice" (Eid, 2007:1037) may well be the practical considerations for attending to each of the CSFs to bring them alive within the practical environment of implementation. The literature review follows the elements of Eid's CSFs.

2.3 STRATEGIC CRITICAL SUCCESS FACTORS

2.3.1 Top management support

While it might appear obvious that top management support for a CRM implementation is critical, Rigby *et al.* (2002:6) suggest that a lack of understanding by senior executives of the details involved in a CRM implementation, including costs and time, is one of the reasons for significant failure. Brown (2016:1) highlights the fact that many top executives are missing the most important part of CRM, that of an appropriate strategy with the company as a whole. As a consultant Brown has noted that a misaligned strategy is a major cause of failure for CRM implementations in a wide range of organisations. Rigby (2002:6) suggests that management need to ensure that performance measures, compensation systems and training programmes are restructured before the rollout of a CRM project. This makes sense in that it allows a clear focus on the project and can bring clarity to issues surrounding change management, a key factor in any CRM implementation (Petouhoff, 2006:48).

Top management also has a role to play in the manner in which the strategy is developed. Ahearne *et al.* (2012:120) recognise two fundamental approaches to CRM strategy development, each of which has its place depending on the business context. They note that top management can themselves develop the strategy and filter it down to the operations, or they can adopt what they refer to as a bottom-up approach whereby strategy development involves a far greater level of employee involvement. What they do note is that top management has a responsibility to ensure the strategy is developed with as complete a view of the organisation as possible, without which the strategy may fail.

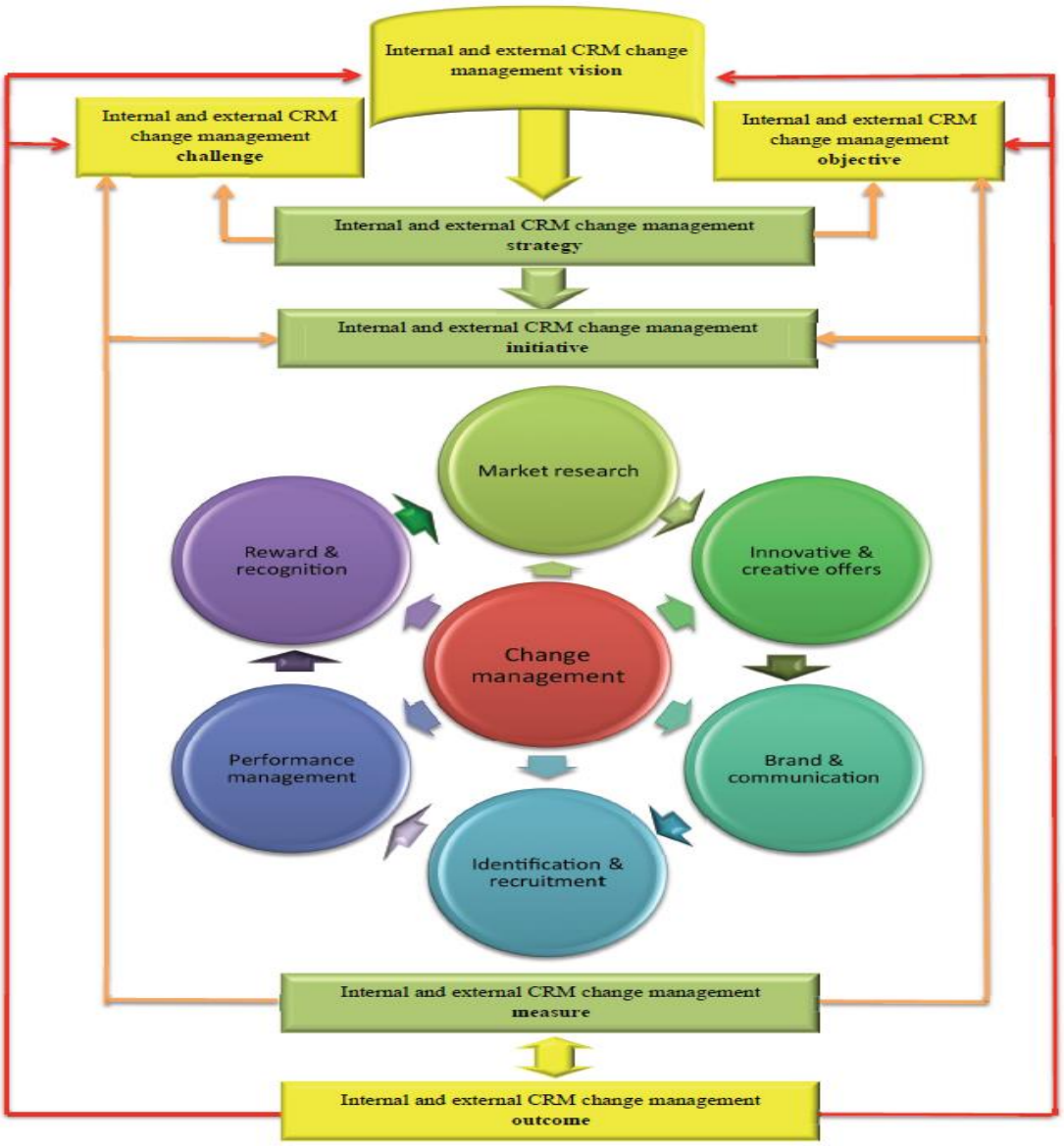
In a study of 125 international hotels, it was shown that organisational commitment and knowledge management play a crucial role in improving organisational performance after the introduction of CRM technology (Garrido-Moreno *et al.*, 2014:1034). The authors note that success depends on an organisation's ability to satisfy customers' needs, and suggest it is therefore important to focus on value creation for both the customer and the company. To support this objective, they recommend that not only should management focus on capturing information to identify customer needs, but also work within the organisation to develop reward structures that support the sharing of this information.

A CRM implementation requires management to acknowledge the need to link the project to organisational transformation, and that this approach requires full and open commitment from all levels in the organisation, starting with top management. In this instance, management have the clear role of persuading employees of the rationale for adopting this CRM approach. Results have shown that if implemented properly, a CRM strategy, supported by the appropriate technology, can improve company performance through increased profits, greater market share and increased sales income. Just as importantly, as the CRM project delivers against improved organisational performance, there is a parallel improvement in the value offered to customers. This is then reflected in enhanced customer satisfaction and loyalty, and a greater ability to provide personalised products and services. Management should recognise that CRM technology impacts indirectly on CRM success, but is ultimately facilitated by knowledge management and organisational commitment (Garrido-Moreno *et al.*, 2014:1034-1039). These findings are supported by Abdullateef and Salleh (2013:1036), whose empirical study showed that knowledge management and CRM technology work together to improve the perceived level of service quality in the customer contact industry.

Management are also advised to consider the role of business process re-engineering in optimising the value generated from a CRM system (Hsin Hsin, 2007:484); but above all else they should consider the value of a structured approach to handling change management issues from an external customer-oriented perspective, and from an internal employee point of view. It is suggested that a common fault of management is that there is an exaggerated focus on the implementation stage of a

change management process, with little effort put into the assessment of readiness for change or the maintenance of change after CRM project implementation (Mai *et al.*, 2014:14). Adapting the findings of a range of studies, the authors developed the CRM change management model shown in Figure 2.1. This model highlights the need for management to consider a wide range of issues in order to bring about effective change in support of a CRM project. This approach aims to balance the needs of both external customers and the organisation's internal customers – its employees (Mai *et al.*, 2014:15).

Figure 2.1: An integrated internal and external CRM and change management model



Source: (Mai *et al.*, 2014:13)

2.3.2 Company culture

“Culture permeates every sales call, every employee interaction, and every product innovation” (Goldsmith & Levensaler, 2016:3). While technology can itself play a central role in the evolution of a company culture (Hartz, 2014:74), the introduction of the technology must at all times remain aligned to the needs of customers and employees. In describing a company culture as being made up of values, processes and organisational structure, with technology being the enabler bringing these factors together, Goldsmith and Levensaler (2016:3) contend that using technology to open up information across an organisation contributes to increased transparency, which in turn assists in maintaining a positive organisational culture. The inclination to share quality information across an organisation is further supported by Šebjan *et al.* (2014:466), who confirm that a culture that has a strong process and technology orientation will be better placed to make use of CRM solutions. They also note that high levels of innovation will further elevate the chances of CRM success.

One of the fundamental principles of CRM is the collection and use of information gathered from the activities of, and engagements with, customers. In support of this, it is suggested that the adoption of a business intelligence culture within an organisation is more important than the technology that is deployed. As business intelligence still relies heavily on human intervention to be of true value, a supportive business intelligence culture is one characterised by creativity and original thought. Adopting and supporting the outlook of the informed sceptic allows employees the freedom to use and interrogate data to develop and share both information and insights, and will ultimately contribute to the development of a culture where business intelligence functions are part of the daily routine within the organisation (Skyrius *et al.*, 2016:172-175). This daily routine should extend to regular two-way communication between the organisation and its customers through multiple channels, so as to contribute to a better understanding of the customer’s needs (Garrido-Moreno *et al.*, 2014:1039) and to ensure benefit to both the customer and the organisation (Šebjan *et al.*, 2014:466). It should be noted, however, that in some industries technology has reduced staff involvement in service delivery, to the extent that simplifying the

customer experience has become a necessary and more important part of the organisational culture (Rahimi & Gunlu, 2016:106).

Finnegan and Currie (2010:157) note that in many organisations individual departments will have their own sub-cultures, which may make integration across departments difficult. They highlight the fact that IT and marketing departments are often at the forefront of the CRM implementation project, but must be brought together by senior management by sharing a common company culture. One particular cultural shift that is required is that of ensuring the information and knowledge are shared across the organisation more freely.

Finnegan and Currie (2010:158) support the idea that for a CRM strategy to be successful business processes need to become customer-centric as opposed to the traditional focus on product. Beasty (2005:30) supports this by citing Freeland, who states that “Companies must instil a customer-centric sense throughout the entire organisation to find success with a CRM practice”. Developing a customer-focused culture can be achieved by sharing company values aimed at developing and nurturing customer relationships. The sense of purpose developed around these values can be supportive of a culture that contributes to CRM success (Brown, 2016:2; Christenson and Walker 2014:58).

While organisational culture is a factor not easily changed, it is recommended that a CRM–culture fit be undertaken in order to understand the challenges an organisation may face while implementing a CRM strategy. In a study of 99 organisations, randomly selected across a wide range of industries, Iriana *et al.* (2013:469) note that organisational culture is a significant risk that requires management attention when launching a CRM project. Their study applied the Competing Values model of Cameron and Quinn, and confirmed that an adhocracy culture is supportive of CRM success, particularly in a B2B environment. This type of culture promotes adaptability and flexibility and would support the themes outlined by previously mentioned authors, in that it also promotes the sharing of information across the organisation. They also note that a clan culture, one in which there is a greater inward focus aimed at maintaining internal harmony, is negatively correlated with CRM success.

Given the prominence of the role of organisational culture in CRM research, it is worth noting that a range of cultural dimensions might impact on the effectiveness of an organisation's CRM implementation. In an attempt to identify those elements that need to be considered, Rahimi and Gunlu (2016:95) undertook an empirical study of a hotel chain in the United Kingdom and were able to identify and rank a range of cultural dimensions that had an influence on CRM success. Their study confirmed that organisational culture factors such as adaptability, consistency, staff involvement and mission have a positive impact on CRM implementation; they stress that organisational culture readiness is key to CRM project implementation. It is worth noting the list of culture dimensions they identified, which are shown in Table 2.1.

Table 2.1: Culture dimensions as predictors of CRM outcomes

CULTURE DIMENSIONS AS PREDICTORS OF CRM IMPLEMENTATION OUTCOMES	DENISON ORGANISATIONAL CULTURE DIMENSIONS
Cross-functional teams	Involvement and consistency
Empowerment/Staff motivation and training	Involvement
Risk-taking/Innovation	Adaptability
Commitment	Involvement
Teamwork	Involvement
Customer-centric culture	Adaptability
Adaptability	Adaptability
Information sharing	Adaptability
Learning orientation and knowledge management	Adaptability
Defined set of mission and visions and clear roles and responsibilities	Mission
Interdepartmental integration	Consistency
Staff involvement	Involvement and consistency

Source: (Rahimi & Gunlu, 2016:97)

2.3.3 Developing a clear CRM strategy

The development of a clear CRM strategy has received a great deal of attention in the literature, and in particular the need for the CRM strategy to be guided by the overall

company strategy is highlighted by a number of authors (Payne & Trow, 2005:168; Beasty, 2005:30; Ahearne *et al.* 2012:119).

While definitions of CRM can indeed be narrow with a strong bias towards technology, Payne and Trow (2005:168) suggest the adoption of a much broader view and in particular a strategic view of CRM and its role in managing customer relationships to enhance shareholder value. The author's research confirms that the absence of a strategic framework for CRM is one of the factors contributing to a lack of success in the implementation process. In developing the conceptual framework for CRM, Payne and Trow (2005:169) focus on identifying all strategic processes involved in the interaction between a company and its customers. Within this framework they highlight the need for the overall business strategy to provide guidance for the customer strategy. Finnegan and Currie (2010:154) note that the strategy must centre on all systems being developed to provide management with appropriate and timely information to allow informed decisions to be made as market challenges occur. Because a wide range of reasons contribute to CRM failures, Mendoza *et al.* (2007:914) support the idea of the CRM strategy being part of a full business strategy.

Despite the perils of CRM, Rigby *et al.* (2002:12) insist that as a strategy, it remains an important factor for company success. They identify what they believe are four critical errors that an organisation may make in applying a CRM strategy. The primary mistake they believe the company can make is to embark on a CRM strategy before creating a customer strategy. This makes sense in that a CRM strategy is developed to support the organisation's vision of how it believes it should be interacting with customers and how it can optimise that interaction by building strong relationships.

Brown (2016:2) believes that many organisations focus on the software and the networks it can provide rather than realising that CRM should be seen as a relationship-building tool. Brown emphasises the "relationship" part of the CRM title. Brown supports the view that any CRM implementation needs to be a company-wide affair, and not merely the role of an IT department. It is important for all organisational departments to identify and work towards those factors that are important for organisational success (Vanpoucke, 2011:3427).

As previously discussed, one of the key challenges organisations face is that associated with the manner in which the CRM strategy is implemented (Ahearne *et al.,* 2012:119). The authors used their extensive experience and interactions with customers and salespeople to investigate and identify the preferred flow of information in terms of the CRM strategy development. It is their view that in the more complex B2B environment, greater strategic clarity can be achieved through what they describe as their bottom-up approach. In particular they note that tacit information is seldom part of a top-down strategy, and may lead to inefficiencies in the execution of the strategy. Ahearne *et al.* (2012:123) note that enhanced lower-level involvement in strategy formulation is particularly important when employees have low technology capabilities. They also note that the bottom-up approach is more suitable when the sales force of the organisation has a high level of tacit information. A broad approach to strategy development is supported by Smilansky (2016:26), who warns against designing a CRM strategy for the boardroom; it should rather address those employees who interact directly with the customer.

In developing a CRM strategy, it is suggested that the focus should be on developing a customer orientation across the entire organisation. This is particularly relevant in B2B where the strategy can be operationalised through the creation of processes aimed at collecting and managing data and disseminating information throughout the organisation. This approach goes beyond the original view of CRM as being purely a tool to support the sales process (Lancioni *et al.*, 2009:58). Extending this concept further, it is recommended that organisations should regard CRM as a strategic tool that goes beyond the simple tracking of customer information and activities, and is instead a means to identify opportunities for cross-selling, identifying potential new prospects and possible conflicts of interest (Lasser *et al.*, 2008:68).

Higher IT involvement leads to a higher level of implementation of CRM. A strategy of marketing differentiation and innovative marketing significantly influence CRM activities, whereas a low-cost strategy has no impact. Finally, a higher level of CRM implementation leads to a positive impact on organisational performance. Interestingly, no correlation was found between industry characteristics of scale and industry group on organisation performance where CRM was implemented (Chung, 2012:9).

(Reimann *et al.*, 2009:329) suggest that a CRM strategy should be built around the three fundamental stages of the customer relationship, namely the acquisition, maintenance and termination stages. They note that experience gained from all three stages will, over time, contribute to an organisation's ability to better manage each of these stages and ultimately to improved customer relationships. These CRM experiences play a direct role in project performance and as such it is important for management to design a strategy that builds on the successes and the experiences gained to ensure a gradual improvement in CRM success over time (Garrido-Moreno & Padilla-Meléndez, 2011:442).

While much of the literature refers to the importance of the development of a CRM-specific strategy, a CRM implementation is affected by the broad strategy adopted by the organisation. In particular, it has been found that CRM does not impact an organisation's performance unless it is implemented within the framework of a strategy of differentiation, particularly in highly commoditised markets, where stable industries are offering similar products to price-sensitive customers. Surprisingly, a CRM implementation appears effective regardless of the level of commoditisation where a cost-leadership strategy is adopted. It is suggested this may be on account of an organisation's ability to identify and capitalise on more profitable customers, thereby contributing to an even more effective delivery of the low-cost strategy (Reimann *et al.*, 2009:339).

2.3.4 Clear project vision/scope

Providing a clear vision and defining the scope of a project can provide substantial support for the inevitable and significant changes that a project is likely to bring about. Boulding *et al.* (2005:158) note, however, that a CRM implementation project need not be complicated, and even limiting the scope to simple technologies and processes can yield positive results. Naturally the project vision and scope will gain direction from an appropriately developed strategy, but key to defining the scope is the understanding of the definition of CRM in the first place (Payne & Trow, 2005:168). Raman (2006:39) also notes that attention needs to be given to segmenting the project into different areas of functionality. For example, he suggests that a focus on improving operational

issues, such as improving efficiencies through automation, requires a different approach to one focused on improving the analytical capabilities of an organisation. Clearly defining project objectives upfront will assist in providing clarity to the vision and scope of the project.

The scope of the project must be guided by a realistic assessment of the resources available to the organisation. These will include, but not be limited to, the funding available, the employees that will be available to drive the project or be involved in the project, and the level of external support in the form of specialist skills. According to Steele *et al.* (2013:1339), this assessment needs to be done ahead of project implementation as it will naturally impact on project scope. In particular they contend that an assessment of the capabilities of the organisation will support setting the terms of reference for the project. They suggest that identifying deficiencies in areas such as customer interactions, information management or processes and operations that support interaction and access to information may enable a project team to identify areas of customisation that will be required during the project implementation.

An integral part of leadership in project management is the establishment of a clear project vision, which is a major factor impacting on project success. The process of developing the project vision must however extend across the functions of creating, communicating and maintaining the project vision in order to positively impact on project outcomes. Key to developing an appropriate project vision is the need to understand the organisational structure, the organisational culture and internal relationships. The role of the project vision is no different to that of a vision created for an organisation – it should show where the project will take the organisation. A key element in effective project visioning is to ensure that all project stakeholders are aligned and able to support and internalise project goals as their own. The shared project vision also creates an opportunity for all stakeholders to clearly understand their roles, and in particular the impact they may have on the whole project, should they not execute as required. Declaring project outcomes in the form of tangible or intangible measures will assist in crystallising the vision (Christenson & Walker, 2014:39). Outlining the project objectives in sufficient detail to cover both the broad and detailed objectives should be undertaken in a manner that addresses the short, medium and long-term timeframes of the project (Mendoza *et al.*, 2007:917).

A failure to clearly outline the objectives of a project is considered one of the most important risks to address prior to launching the project. A failure to outline these objectives, and to ensure all relevant parties understand them, lays an organisation open to the risk of moving to a less competitive position than before project initiation. Key to obtaining a full understanding is the need to ensure both internal and external resources are aware of, and are aligned with, the project objectives. This alignment creates a greater level of efficiency in terms of implementation progress. Defining objectives ahead of the project also allows the objectives to be assessed in terms of the organisation's business objectives. This serves to reinforce the importance of the objectives to the organisation. Involving each department in contributing to objectives will also assist in providing clear project objectives (Monitor, 2008:21-22).

Scoping needs to consider a project's value, the quality of work required at each point in the project, and the resources required to complete the project. Inaccurate definitions of resource requirements can lead to scope changes and potential project failure (Woolridge *et al.*, 2009:147). The authors propose that software-based projects consider both the goals of the project and the resources required to achieve the goal. Identifying the metrics involved for each goal assists in aligning the resources and actions required to achieve the goal. Identifying these metrics will also clarify whether or not the project remains within scope and whether or not it is successful.

As a summary, (Christenson & Walker, 2004:42)) recommended guidelines that can be applied to the preparation of a CRM project vision. These are:

- The project vision should be understood, together with the underlying reasons for implementing the project.
- The project vision should be motivational, to assist internalisation by all stakeholders.
- The project vision should be credible, and in particular be aligned to company culture.
- The project vision should be challenging, in order to appeal to a service of performing at a high level.

2.4 TACTICAL CRITICAL SUCCESS FACTORS

2.4.1 Employee acceptance

Finnegan and Currie (2010:157) point out that a CRM strategy requires buy-in from all levels of the organisation, but the implementation is itself complicated by the need to account for the diversity that exists within the organisation. Change management programmes become an essential part of generating employee acceptance of any intervention that will bring about change, as managers and executives need to accept that people and employees are naturally inclined to resist this change (Petouhoff, 2006:48). CRM failure can also be linked to the belief that change management is only about the relevant communication plans and training activities. The latter can be seen to account for only about 50% of all relevant change management activities, with other factors relating to operating to a definite change management plan (Petouhoff, 2006:48). Rigby *et al.* (2002:6) refer to a study of managers who cited that 87% of projects failed on account of a lack of adequate change management.

Boulding *et al.* (2005:158) contend that people issues need to be attended to before embarking on any CRM initiative that is likely to bring about changes in company systems and processes. This makes sense and would support a greater level of employee acceptance of the CRM initiative, as change management issues would be clearly focused on the CRM project and not some other extraneous distraction. Raman *et al.* (2006:41) agree with the need for end-users of the system to be consulted at all stages of the implementation process. This end-user involvement will enhance employee acceptance and enable an organisation to focus on the development of appropriate and practical systems to support the broader objectives of CRM. The need to share success stories across the organisation is key to enhancing the opportunities for enhanced employee acceptance in CRM implementation (Raman, 2006:47). Furthermore, the use of a cross-functional approach to the CRM implementation will generate broader acceptance and create the opportunity to develop early champions of the project throughout the organisation (Rigby *et al.,* 2002:6).

Selling the benefits of the CRM strategy will logically form a key part of generating employee acceptance. For example, Ahearne *et al.* (2007:336) found that salespeople who make use of IT tools can significantly improve their performance in achieving

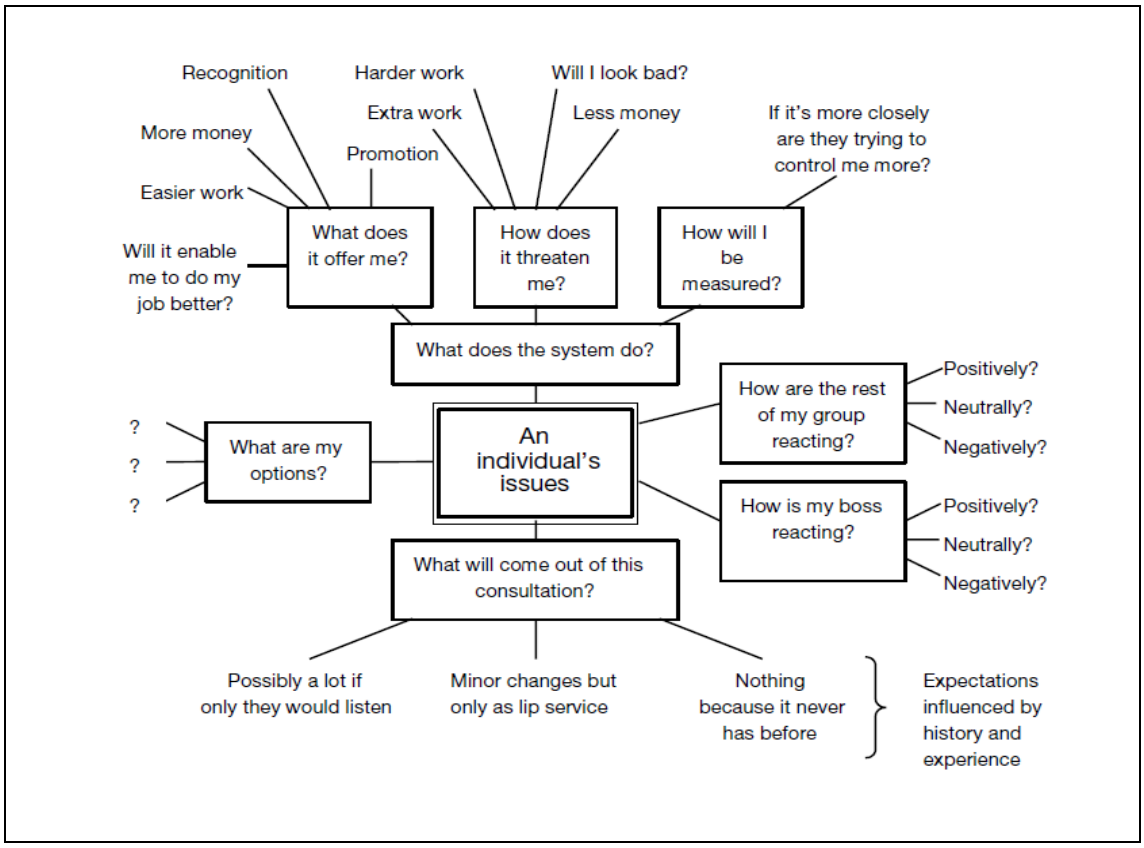
sales objectives and improve efficiencies relating to their function. Generating meaning for employees is a key part of any CRM project success. While staff commitment needs to be addressed, it should be done with an acknowledgement of the difficulties of measuring commitment, given that many organisations assess employees on the basis of tangible results, with little direct measurement of levels of commitment or compliance with regulations (Mendoza *et al.*, 2007:917).

Building processes that add value to the employee plays a big part in generating employee acceptance. At the same time, studies in the United States show that organisational structure supported by contingent rewards and accountability lead to improved performance when following a CRM strategy (Lasser *et al.*, 2008:68). Ho *et al.* (2014:51) however counter this by showing that without consensus on the need for the CRM strategy, performance management and reward systems will have little meaning to employees and will not bring about the expected levels of employee motivation for the CRM project. Other factors shown to support improved employee acceptance of CRM systems include those aspects of the organisation that contribute to employee satisfaction. In this regard, organisational flexibility has been shown to improve CRM effectiveness through its impact on employee satisfaction (Jafari Navimipour & Soltani, 2016:1062).

Employee acceptance levels play a key role in determining the response to the inevitable teething problems experienced with a CRM project. It is suggested that with strong employee acceptance, early adoption faults will be recognised and attended to by system users rather than be treated as a source of complaint Furthermore, it is suggested the system must be seen as being of real value to employees' jobs and not as a means of monitoring employee performance (Coner & Rogers, 2015:268). They note some key invalid assumptions concerning attitudes within an organisation which can potentially derail a project. These include assuming that employees will automatically adopt a new system on the basis of the benefits of the project being explained to them. A second assumption is that employees and managers will put the organisation's interests ahead of their own or their department, and thirdly that all functions within the organisation share the same view of what is in the best interests of the organisation. Correcting acceptance issues early on in the CRM project is critical, given the increasing difficulty in addressing these issues as the project

progresses. Figure 2.2, outlines a range of employee issues that should be addressed in order to generate optimal levels of employee acceptance.

Figure 2.2: Employee issues to consider with CRM implementations



Source:(Coner & Rogers, 2015:271)

Coner & Rogers (2015:270) are also of the opinion that end users will adopt a system more readily if they can accept the new system serves their own interests together with those of the organisation. They also believe it is important that individuals who have influence within the organisation are seen to support the new system. In summary, the authors suggest that CRM requires a greater focus on people issues than financial or ERP systems.

2.4.2 CRM software selection

Finnegan and Currie (2010:158) note that many companies overspend on the technology instead of focusing on the quality of data and the integration of that data with all customer touch-points within the organisation. They believe that an over-emphasis on processes and technology can lead to internal inefficiency through process duplications and a lack of inter-departmental collaboration. It is suggested that organisations may reach a threshold in CRM expenditure sooner than might otherwise be expected, with one study showing that apart from a base level of spending, additional CRM expenditure had no influence on organisational performance (Josiassen *et al.*, 2014:134).

A common fault remains that of focusing on the provision of the IT infrastructure at the expense of recognising the importance of the relationships between employees and between a company's sales force and its customers. Merely investing in CRM technology does not automatically lead to success. Having said this, a key part of CRM is the collection, analysis and dissemination of information to relevant players across an organisation and as such, the focus on the selection of appropriate software has to be key to the success of the project (Garrido-Moreno *et al.*, 2014:1034).

Payne and Trow (2005:169) suggest that the information management process be clearly defined ahead of providing direction for the selection of the enabling technologies. To achieve best results, ensure business rules and processes are clearly developed before the development of the technology In particular it is suggested that attention be paid to data repositories, IT systems, analytical tools and front- and back-office applications (Iriana *et al.*, 2013:484)., while Raman *et al.* (2006:41) emphasise the need for sales team structures and processes to be clearly mapped before attempting to identify the CRM system to follow. They also suggest that software flexibility and end-user skills levels form part of the criteria for selecting software. These selection criteria can be further expanded upon by considering the software vendor in terms of technical support capabilities and business consultancy skills (Lee *et al.*, 2014:4). It is also prudent to expect a short-term decline in company performance after implementation, but this can be avoided by open communication with top management, vendors and consultants all agreeing with and working towards realistic performance metrics (Shaul & Tauber, 2013:19).

There is obviously a range of software options available, from those that form part of well-known ERP systems such as SAP, those linked to database management systems such as Oracle, or stand-alone packages that allow for implementation in conjunction with or in support of existing programmes. Furthermore, hosted CRM models can be seen as a cheaper alternative, with implementation being faster with relatively low start-up costs. Open-source software is recommended for smaller or medium-sized organisations that can neither afford or need the proprietary packages offered by larger software organisations (Lee *et al.*, 2014:2). They note that open-source software allows a user to modify the source code, as the code is made available to the public. Open-source is a realistic low-cost option, but should also be subject to tests of suitability in terms of characteristics such as functionality, reliability or flexibility. An assessment of the fit of the software with company characteristics such as the industry or the organisation's internal capabilities should be included.

While the cost of the software is an issue, it must be recognised that the availability of a CRM infrastructure to capture customer data is a first step in the process of getting to know customers better (Garrido-Moreno *et al.*, 2014:1034). The relevant risks must therefore be assessed along with the benefit of a smaller financial lay-out and long-term services offered. Beasty (2005:30) contends that organisations are often not aware of the functionality at their disposal and may continue to seek further support when it already exists. Understanding which elements of the functionality are to be pursued will also impact on the selection of the CRM software.

At a functional level, organisations need to be aware that CRM software can be classified into two categories, namely targeting-related and support-related software. The former relates to using CRM to improve profitability through the application of activities that aim to capitalise on knowledge about customers. The support-related approach focuses on building the relationship and enhancing customer service. Targeting-related packages relate to back-office activities and associated analytics. Customer support training must include a focus on customer interaction, whereas targeting-related software requires a focus on back-office analytics (Kim & Mukhopadhyay, 2011:625-626). Table 2.2 shows the basic distinction between these two software categories.

Table 2.2: Categorisation of CRM modules

CATEGORY	EXAMPLES	EXPECTED BENEFIT	MODELLING
Targeting-related CRM modules	Marketing Analytical modules Business Intelligence	Enhanced targeting accuracy	Accurate classification of customers
Support-related CRM modules	Call-centre Salesforce Filed service Order management	Enhanced customer support quality	Higher probability of being loyal

Source: (Kim & Mukhopadhyay, 2011:627).

Organisations often choose to implement one category first, because of the different focus from a business, customer and employee training perspective. A key output of the targeting-related software is the accuracy with which customers can be identified as being loyal or non-loyal. The support-related software provides support for customising the service for each customer or customer segment, aiming at enhanced customer service and an increased likelihood of customers remaining loyal. Improved organisational performance can then be analysed from the perspective of being able to optimise prices charged to loyal customers, who would be less sensitive to price and more willing to make the purchase without significant promotional costs. It is noted that without an appreciation of the different types of CRM software, companies may overestimate the value they will gain through taking on additional features; this might

explain why many CRM projects are considered not to have fulfilled an organisation's expectations (Kim & Mukhopadhyay, 2011:627).

Finally, as part of a survey of CRM software vendors, Kane (2009:4-5) suggests the following points as making the most practical approach to selecting a CRM solution.

- Select for the long run but implement for the short run. This implies the use of a phased approach to the rollout plan.
- Be realistic about implementation scheduling and avoid being misled by vendors selling rapid implementations.
- Ignore the features and stay focused on objectives.
- Price should be based on clear scope to avoid the temptation to fix costs as part of the implementation (this invariably leads to unnecessary margin of error estimates being included in the fixed project cost).
- Balance vendor capabilities with internal capabilities.
- Ensure back-office integration allows for managing the process after the sale to encourage the development of the customer relationship.

A key theme throughout the various discussions surrounding software selection is that CRM is not simply about installing the software and expecting everything to fall into place. Technologies continue to evolve and must naturally be considered an important part of any CRM strategy, but must be seen as supporting the strategy, and not being the strategy.

2.4.3 Integration with other systems

Most CRM initiatives provide data for or require data from other processes or functions within an organisation. A key objective in sharing this information is to integrate systems to allow for information to be available to the front line: for example, allowing the sales force to shift focus towards understanding target customer priorities, or working to retain customers who may be at risk of leaving. Without supporting this shift in focus, sales staff will continue to lose time performing administrative functions such as collecting sales data from a range of sources. Effective integration allows for a more efficient sales force (Goldsmith & Levensaler, 2016:4). Finnegan and Currie

(2010:154) confirm that developing any new strategy or process within an existing organisation requires careful attention to issues around integration. They suggest that this integration process, which involves the coordination of effort across many departments, must be recognised as demanding of time and resources. They further suggest that organisations should view a CRM implementation as part of a "systems integration strategy" in order to ensure data is available and useful across the entire organisation. By following this approach they believe that the complex interdependences of various organisational elements such as culture, process, people, and technology will be better accounted for.

Boulding *et al.* (2005:158) support the notion that the effectiveness of CRM activities is dependent on the degree to which CRM is integrated into the company's existing processes and capabilities. They state that CRM processes must not only focus on the collection and analysis of data but must also ensure the integration of activities throughout the organisation. In particular they note it is important that this integration brings about, or is focused on generating, customer value. This supported by the view that effective integration of technologies and processes can contribute to a higher level of support for a CRM strategy by highlighting the relevance of the project across all departments (Mendoza *et al.*, 2007:934).

Das and Dasgupta (2009:9) provide a range of recommended best practices for the banking sector, but ultimately many of these are dependent on employees being able to access customer information from a single point, following the successful integration of systems across the organisation. They suggest systems integration should be aimed primarily at ensuring consistency in the information available across the organisation. In general terms objectives must be clearly documented in a way that covers all areas of the business so as not to alienate certain sections (Mendoza *et al.*, 2007:935). Providing a single view of the customer brings about a higher level of customer-centricity and contributes to improved employee productivity. Apart from efficient access to information, integration issues should consider all forms of communication with the customer, not only to capture this data, but also to ensure a consistent approach to managing customer relationships (Garrido-Moreno & Padilla-Meléndez, 2011:439). This view is supported by Šebjan *et al.* (2014:460), who note

that providing an integrated view of the customer allows for enhanced decision-making and ultimately the enhancement of customer relationships.

2.4.4 Training

Many organisations are aware of the importance of training, but only half of those that do it actually feel they do it well. The major constraint on effectively attending to training needs is reluctance to let employees take time away from their normal duties (Smilansky, 2016:26). Training on new systems, processes and/or technologies is a key element of any CRM strategy, but according to Petouhoff (2006:48), the organisational structure and the framework created for leading successful change can minimise the risks identified with personnel associated with the implementation. Implementing this framework can help a company to obtain training attendance as high as 97%, with 100% of identified users and personnel being in a position to adopt the system at go-live. As mentioned previously, training forms a key part of any change management programme and should be afforded the attention it deserves (Cong *et al.*, 2014:15).

Training needs to be started sooner rather than later. If the end-users are part of the process from the beginning, adoption of the technology will naturally happen faster as end-users are given the opportunity to understand the benefits of the application and buy into the project much sooner (Garrido-Moreno & Padilla-Meléndez, 2011:439). Das and Dasgupta (2009:9) recognise that training should be aimed at empowering employees to make use of the system to respond to customer feedback as and when it is received.

A range of training options are now available to organisations, with the obvious advances in information and communication technologies. Demonstration-based training involving video instruction coupled with specific tasks has proven to be a valuable method of training users in the use of software. Vvan der Meij and Van der Meij (2014:151) support this approach by noting the trend towards the use of video instruction. They do however suggest there is a need to consider the value offered by both paper-based and video-based approaches to instruction. In particular, they note that paper-based systems allow the trainee control over the timing of the instruction

and the order in which it can be experienced, whereas video-based instruction offers greater visual stimulation and clear active simulations of the work that needs to be performed.

In summary, training is often overlooked but must be seen as not only a key part of upskilling employees, but also a critical component of change management. Training needs to be carried out in a carefully considered manner in which clear outcomes are targeted and employees gain a sense of ownership of the strategy being implemented.

2.5 OPERATIONAL CRITICAL SUCCESS FACTORS

2.5.1 Realistic CRM implementation schedule

Organisations need to target achieving success on their first attempt at implementing a CRM strategy. As the implementation will involve a multi-staged approach, and employee morale and commitment to the project will depend on achieving the goals set, it is important that the need to bring about the change as quickly as possible be balanced with the capabilities and resources of the organisation. Following a phased approach to a CRM implementation to achieve these objectives becomes an important but recommended option (Coner & Rogers, 2015:273). Beasty (2005:30) agrees that a smaller project that is manageable can gain more momentum and achieve a higher level of end-user acceptance and adoption. Rigby *et al.* (2002:8) also suggest that organisations consider a hybrid approach to CRM, making use of the minimum amount of technology to begin with, and building on this platform as each element of the CRM project gains acceptance.

In a continuation of the recommended phased approach, it is noted that CRM implementations may take many years to complete and an organisation's profit is likely to be impacted by not only the implementation approach but also the order in which the different models are implemented. It is therefore recommended that in a phased approach, an organisational should focus on support-related CRM software, particularly if the organisation has identified a large loyal customer segment. In support of this argument is the example of the Heinz company, where a targeting strategy was adopted in a move to maintain its large base of loyal customers (Kim & Mukhopadhyay, 2011:637).

2.5.2 Enterprise performance metrics for CRM

Research into performance measurements for overall CRM project performance is not common, but it is suggested that elements of assessment should focus on strategic, infrastructural and process categories to obtain an all-round view of CRM performance. Furthermore, adding an element of employee behaviour will complement the usual focus on financial or marketing factors, as measures of behaviour are key to understanding the performance of the organisation in terms of developing customer relationships. Developing these relationships is an important precursor to achieving economic performance (Isfahani *et al.*, 2014b:378). The need to develop metrics that cover attitudinal aspects of relationship management, such as relationship quality, is supported by Hyun & Perdue (2017:73). They note further that these soft measures should be complemented by behavioural metrics such as customer lifetime value or customer equity. They add that other key measures of CRM success follow the various phases of CRM, namely customer acquisition, customer retention, customer expansion and customer defection.

Identifying the key deliverables from a CRM perspective can provide an organisation with the feedback it needs, not only to confirm the value of being able to track important metrics but also the organisation's ability to react to market conditions and ultimately achieve its goals of an expanded and more loyal customer base. The accuracy of customer data must be seen as the lifeblood of CRM, and it is critical that this data is standardised across all customers and for the whole organisation (Beasty, 2005:30). Understanding which metrics are important to an organisation allows the necessary focus on the processes for collecting, analysing and disseminating this data in the form of useful information. Extending data collection to monitor responses to marketing strategies involving the four Ps (product, price, promotion and place) can bring depth to understanding the potential for customer relationships. In particular, it is accepted that the four Ps play an integral part in the customer acquisition stage; understanding the conditions under which new customers are acquired provides a good indication of likely levels of future customer loyalty. New customers attracted by a promotional price will often exhibit low levels of loyalty but as the length of the relationship extends, sensitivity to pricing issues is reduced (Hyun & Perdue, 2017:74).

Payne and Trow (2005:174) point out the need for a performance matrix to be identified and in place before the rollout of a CRM project. This supported by Brown (2016:3), who goes on to identify metrics as an important part of any CRM strategy, but notes that the key is to ensure that these metrics track not just sales actions but relationships as well. He argues that a relationship matrix will provide an organisation with a view of the level of importance the organisation has in the eyes of the customer. Brown highlights the fact that relationships are durable, and therefore including a relationship matrix within the organisation will assist with long-term sustainability.

It is argued that meaningful and reliable metrics that help an organisation track its performance in key areas bring about greater focus and at an operational level, must give meaning to the purpose of the CRM strategy. In particular, there is a need to include metrics that relate to the value created for the organisation's customers; these metrics must include qualitative measures of customer satisfaction (Garrido-Moreno & Padilla-Meléndez, 2011:440). In addition to issues around the sharing and management of customer information, there must be an overriding objective of getting to know the customer. Key metrics include customer segmentation, profitability and lifetime values for individual customers; the development of a customer retention plan; metrics around periodic acquisition and desertion rates; measures of customer satisfaction; and a history of customer complaints and how they were resolved (Mendoza *et al.*, 2007:917).

As a summary of the range of CRM performance metrics that might be useful for any CRM project, those recommended by Isfahani *et al.* (2014a:378) are noted in Table 2.3. While not all metrics will apply across all industries, the list provides a good sense of what can be measured when an organisation takes the time to develop meaningful CRM performance metrics.

Table 2.3: CRM performance metrics

PERSPECTIVE	COMPONENT	EXAMPLES OF MEASURES
ORGANISATIONAL PERFORMANCE	SHAREHOLDER VALUE	SHV
	PROFITABILITY	ROA, ROI, NET SALES/EMPLOYEE
	CUSTOMER EQUITY	CUSTOMER EQUITY, CUSTOMER LIFETIME VALUE, PROFIT/CUSTOMER
CUSTOMER	CUSTOMER LOYALTY	RECENCY, FREQUENCY, MONETARY
	CUSTOMER SATISFACTION	SATISFIED CUSTOMER RATIO
	CUSTOMER VALUE	CUSTOMER COMPLAINTS
PROCESS	CUSTOMER ACQUISITION	LEADS PER CHANNEL, ACQUSITION NUMBERS, VISITS OF WEB, WIN-BACK %, PROFITABILITY OF NEW CUSTOMER(S), SALES SUCCESS RATE/CONVERSION RATIO
	CUSTOMER RETENTION	RESPONSE TIME, COMPLAINTS RESOLUTION TIME, RETENTION RATE %, DELIVERY TIME, CUSTOMER CHURN RATE, REJECT RATE PER DELIVERY
	CUSTOMER EXPANSION	SHARE OF WALLET %, CORE CUSTOMER RATIO, CROSS/UPSELL RATE, VALUE PER ORDER
INFRASTRUCTURE	CRM TECHNOLOGY	CAPACITY TO MEASURE ALL ABOVE COMPONENTS, CUSTOMER INFO ACCURACY, CUSTOMER INFO INTEGRATION, SYSTEM STABILITY
	EMPLOYEE BEHAVIOUR	HUMAN CAPITAL READINESS %, JOB EFFICIENCY (TIME PER TASK, NO. OF CALLS MADE), PROFIT PER EMPLOYEE
	EMPLOYEE SATISFACTION	KEY EMPLOYEE TURNOVER
	MANAGEMENT ATTITUDE	
	ORGANISATIONAL ALIGNMENT	TRAINING DAYS/EMPLOYEE
	ORGANISATIONAL STRUCTURE	IMPROVEMENT IN DIVERSITY PROFILE
	PARTNERSHIP	VENDOR DIVERSTIY
	MARKET ORIENTATION	FREQUENCY OF CUSTOMER SURVEYS, CUSTOMER KNOWLEDGE CREATION
	EXPLICIT GOAL	ADHERANCE TO PLANS

Source: Adapted from (Isfahani *et al.*, 2014a:384)

2.5.3 Personalisation

Finnegan and Currie (2010:155) point out that the focus on building long-term relationships with customers is underpinned by the concept that retaining existing customers is far more beneficial and less costly than trying to acquire new customers. This outlook confirms the move from a transactional approach in attending to customer needs, to a more value-based approach in which a greater level of personalisation occurs. CRM strategies, particularly in the B2B environment, are intended to deliver a

level of customer service that is unique, or at least appears unique, to customers identified as being of long-term potential value to an organisation. This implies a greater reliance on the tacit knowledge of the individuals engaged in customer interactions to develop these long-term relationships, but also suggests that the personalisation must occur not only for the customer, but for the sales force as well (Ahearne *et al.,* 2012:126). Ahearne *et al.* define explicit knowledge as the information available within an organisation that can be formally shared, whereas tacit knowledge is specific to individual customer interactions and can lead to a richer base of knowledge and help explain the behaviours of specific customers.

Foss *et al.* (2008:72) confirm the view that CRM systems can be viewed on a very narrow basis, for example merely being a contact centre for service or sales. They do however note that the evolution of CRM extends to real-time decision-making, managing customer experiences and creating specific customer marketing plans that require a personalised approach. Creating the optimal personal offering therefore requires the appropriate use of tacit information together with information readily shared across the organisation. Establishing how this information will be collected, analysed and shared to provide a personalised customer offering is a key challenge for any CRM initiative.

2.5.4 Customer orientation

Having already noted that customer orientation needs to be a key part of an organisation's culture, creating customer orientation at an operational level is about entrenching these values in the day-to-day activities of the organisation. Many of the issues identified as relating to customer orientation have an influence on, or are influenced by, other CSFs. For example, Payne and Trow (2005:174) suggest that key metrics, such as levels of customer retention and customer satisfaction, should be reaching board level to entrench the customer orientation. They note however that this is seldom the case, which may contribute to CRM failure or the loss of potential value from a CRM initiative. Designing a CRM system to support the collection and dissemination of customer-orientated information can contribute to CRM success. Raman *et al.* (2006:39) refer to the need for salespeople to spend time on customers

and activities that bring about the greatest benefit to company profitability, as opposed to simply being highly active in the marketplace.

Modern trends in technology and social media are having an influence on levels of customer orientation, often driving organisations to adopt appropriate measures to support this need. It has been found that when social media is used within a CRM framework, customer retention and as a result sales performance are improved (Lancioni *et al.*, 2009:97). Ahani *et al.* (2017:561) highlight the increasingly important role of social CRM in managing the customer relationship, driven by general access and familiarity with the technology. They also note there are expectations or pressures from customers themselves to provide access to CRM tools. CRM is by its nature customer-orientated and encourages such an approach. Results from studies within the B2B context show that implementing a CRM improved customer orientation, and furthermore that the use of CRM leads to improved organisational performance (Lancioni *et al.*, 2009:75).

Rigby *et al.* (2002:11) suggest that having detailed information about a customer does not necessarily give the company the right to harass the customer into developing a relationship. Some customers are simply not interested and pursuing such customers may result in a negative outcome. In terms of customer orientation, Brown (2016:2) suggests that organisations need to be aware that not every relationship holds equal importance. Prioritising relationships requires that target customers become aware of the fact that they are important to the business. He notes a CRM strategy must therefore be able to respond to the requirements for building a strong customer focus, but one in which information is shared to the benefit of both the organisation and the customer.

In recognising the interplay between different CSFs, it can be shown that a customer orientation, through a focus on employee training and the processing of customer information, impacts positively on CRM performance. It is noted that identifying the mediating factors through which customer orientation can be effective is key to understanding the impact of customer orientation on CRM. Training employees is critical in the service context, given the direct relationship and interaction that employees have with customers, as a customer orientation alone is unlikely to bring

about a positive effect (Kim, 2008:194-211). This may well be supported by Abdullateef and Salleh (2013:1036), who found that in considering four different dimensions of CRM (customer orientation, customer organisation, knowledge management and technology-based CRM), customer orientation had no significant impact on perceived levels of service quality. This may be due to the study being conducted within a service contact industry, where customers prefer a self-service approach, so the role of the service employee is diminished. A customer orientation will however direct an organisation towards developing systems and processes that are better aligned to managing customer relationships, and will therefore encourage higher levels of customer loyalty (Garrido-Moreno & Padilla-Meléndez, 2011:439).

A customer-orientated approach needs to address the three stages of customer relationship management, namely initiation, maintenance and termination, with the maintenance phase covering activities relating to customer retention as being the most important. The use of CRM software, in a format that supports the accessibility of appropriate customer information, is a critical complement to effective customer orientation, with frontline staff in particular needing to be proficient in the use of the CRM software (McNally, 2007:181).

While noting that customer-centricity is now one of, if not the top, priority for most organisations, with a high percentage of organisations declaring their intention to adopt a customer-focused strategy in the near future, the overriding purpose of the customer-orientated approach should be to make it easy for customers to do business with the organisation. While recognising once again the overlap between the various CSFs, key elements suggested to consider for generating a strong customer orientation include the following (Smilansky, 2016:24-26).

- a social media presence
- effective website maintenance and navigability
- strong technical support
- a comprehensive CRM
- empowered customer service agents
- responsive telephone systems

- effective service recovery processes
- customer analytics
- employee engagement
- streamlined processes

It has become important to note that customers do not only compare an organisation to others within the same industry, but will use the benchmarks set by any company, be it an Amazon or an Apple, define in part the expectation of ease of doing business (Smilansky, 2016:26).

2.5.5 Data mining

Data mining is not so much about having access to data within an organisation's database as it is about an organisation's ability to find useful or interesting structures in the data in order to develop models or provide forecasts or predictions of key elements of the organisation's business (Tan, 2006:1; Roiger, 2017:5). CRM has developed to a point where the finest details of customer spending patterns and preferences can be captured, but ultimately the ability of an organisation, through its staff, to access and make use of this information will determine its effectiveness, with access to information through mobile devices having become a must (Sebring, 2016:26). Boulding *et al.* (2005:158) make the point that identifying relevant information and making the appropriate use of that information is a key contributing factor in terms of CRM success. This is supported by Estrada (2015:53), who notes that a focus solely on the configuration and functionality of the CRM software, ignoring the integrity and quality of the data that goes into the software, is a very common mistake that organisations make. He adds that knowing what data is available, and having the tools to extract and make use of these databases to provide meaningful information, is a key element of data mining.

Brown (2016:2) suggests that organisational leaders need to be clear about which relationships are critical to the success of the business, and equally as important they should know how these relationships will be supported to grow the business. This provides a useful indication of the extent to which data mining will support the need for key metrics within an organisation. The provision of high-quality information will

assist customer-focused employees to make informed decisions on how to respond to customer demands (Iriana *et al.*, 2013:484). With the emphasis on high-quality information, it is recognised that the collection of data should focus on specific areas of value to ensure the accuracy and fullness of data capture, as opposed to gathering a wide range of inaccurate data (Shaul & Tauber, 2013:19). Marketing the CRM strategy within the organisation remains key to ensuring that employees place value on collecting and capturing the right data (Lasser *et al.*, 2008:70). Harnessing this information is particularly important for larger, more fragmented organisations, where institutional memory cannot be relied upon to adequately pass on information about various customer requirements (Lancioni *et al.*, 2009:59).

As an addition to issues around the sharing and management of customer information there needs to be an overriding objective of getting to know the customer. Key metrics will include customer segmentation, profitability and lifetime values for individual customers, the development of a customer retention plan, a matrix around periodic acquisition and desertion rates, measures of customer satisfaction and a history of customer complaints and how they were resolved. Data mining through the use of a common data warehouse can enhance the level of consistency of information available across the organisation, but while this information is important, there still needs to be a focus on all aspects of the customer relationship. (Mendoza *et al.*, 2007:917).

In keeping with the deeper definition of data mining, the related topic of knowledge management has been identified as a key factor in CRM success. Deliverables from a CRM approach require a high level of skill, for example to identify high-value customers. This type of information requires an element of predictive analytics, with CRM processes being highly dependent on the management of customer knowledge. It therefore becomes important for management to develop capabilities within the organisation to address those customer knowledge management processes. It is therefore suggested that the ability to collect and apply information relating to customer relationships will be hard for competitors to imitate and will therefore provide a competitive advantage to any organisation that is able to achieve this. While data or information may reside within an IT system, knowledge resides in people and must therefore be seen as a key element in CRM success (Garrido-Moreno & Padilla-

Meléndez, 2011:438). This is supported by Josiassen *et al.* (2014:134), who show that organisations with a higher capacity to generate information performed better than those with a low capacity. The results are seen in improved customer outcomes, but can also be seen as an efficient use of the organisation's resources. The authors note further that the distribution of information throughout the organisation, even to those not able to use it directly, helps give a clear indication of where the organisation intends to go.

2.6 CONCLUSION

A common thread that runs through much of the literature is that a CRM strategy must be considered from a multi-dimensional perspective. Organisations that embark on a CRM journey must prepare themselves to put in the time and effort, at all levels within the organisation, in preparing for and executing the strategy in as much detail as possible. Making use of a CSF approach brings focus to a range of issues that must be considered to support the success of a CRM implementation; but ultimately an organisation must look at its own unique situation and develop its CRM within the framework of the overall organisational strategy.

2.7 CHAPTER SUMMARY

In this chapter, the reader was presented with the research background and context for the development of the 14 CSFs used in this study. The importance of CRM to business was highlighted as was the tendency for many CRM projects to be considered a failure. The role that each of the 14 CSFs play in contributing to CRM project success or failure was provided while the range of mediating factors that influence each factor's influence was highlighted where applicable. In the next chapter, the reader will be provided with the details of the methodology approach adopted to collect and analyse the data.

CHAPTER 3

3. RESEARCH METHODOLOGY

3.1 INTRODUCTION

The research followed a qualitative interpretivist phenomenological methodology with data collected in the form of interviews (recorded and transcribed) and required an intuitive approach to its analysis. Software was used to code and analyse the data from interview transcripts.

In this chapter, the detail of the research design is provided together with the rationale and methods for population sampling, data collection and data analysis. The quality and rigour of the research design is discussed by reviewing a number of the risks associated with the research. Finally the ethics of the study are discussed.

3.2 DESCRIPTION OF OVERALL RESEARCH DESIGN

The study is cross-sectional in nature, given that all interviews and the focus group discussion took place within a specific four-week period. There was no intention to carry out follow-up interviews, apart from seeking clarity on information gathered from the initial interviews. The interpretation of the data was based on the interviewees' views on the subject at a single point in time.

Qualitative research aims to discover experience, processes and causal mechanisms. While it research has its detractors, Bluhm *et al.* (2011:1867-1870) note that this methodology can be seen to be on the rise, based on the frequency of articles in leading American management journals. They note, however, that qualitative research still faces resistance, primarily due to the positivistic lens through which many reviewers evaluate research value. The authors express the view that the adoption of quality qualitative research is likely to continue to rise. In their view, qualitative research is vital in the discovery of deeper processes within the target sample and offers the opportunity to gain insights into what individuals experience and how they interpret those experiences. Furthermore, they note it is important to confirm whether a theoretical purpose exists, or whether the intention is to be merely interpretive.

While contemporary guidelines for conducting interviews of a general qualitative nature are valid, specific nuances are needed to meet the requirements of a phenomenological perspective. In shaping the research approach it is important to understand that phenomenological researchers choose the interview method of data collection from a desire to generate the meaning of a particular phenomenon as lived by individuals. This attempts to obtain a human scientific perspective separate from the researcher him- or herself (Englander, 2012:14). It should also be recognised that research designs within the qualitative realm can take the form of an interview, observations, archival analysis, a questionnaire approach, or other miscellaneous designs (Bluhm *et al.*, 2011:1885). This study made use of a focus group, individual face-to-face interviews and a telephone interview.

As a research methodology, phenomenological studies are based on several assumptions, which include understanding that as a study of social constructs, meaning and knowing are always incomplete and evolving. Furthermore, the researcher is part of the experience and plays a role in the research, while some bias is inherent and should be articulated at the beginning. In this regard it should be noted that the researcher has a business relationship with the organisation used as the sample population. Finally, due to the reliance on researcher intuition, meaning may not be shared by everyone (Boss, cited in Grossoehme (2014:116)). The overriding point, however, is that phenomenology can be useful in investigating the experiences of a particular group of people, with an accurate presentation of the phenomenon being more valuable than an ability to claim general applicability (Grossoehme, 2014:117). In this regard a focus group was included so as to use the group dynamic to self-moderate responses in order to be more accurate representations of the experiences regarding CRM project implementation.

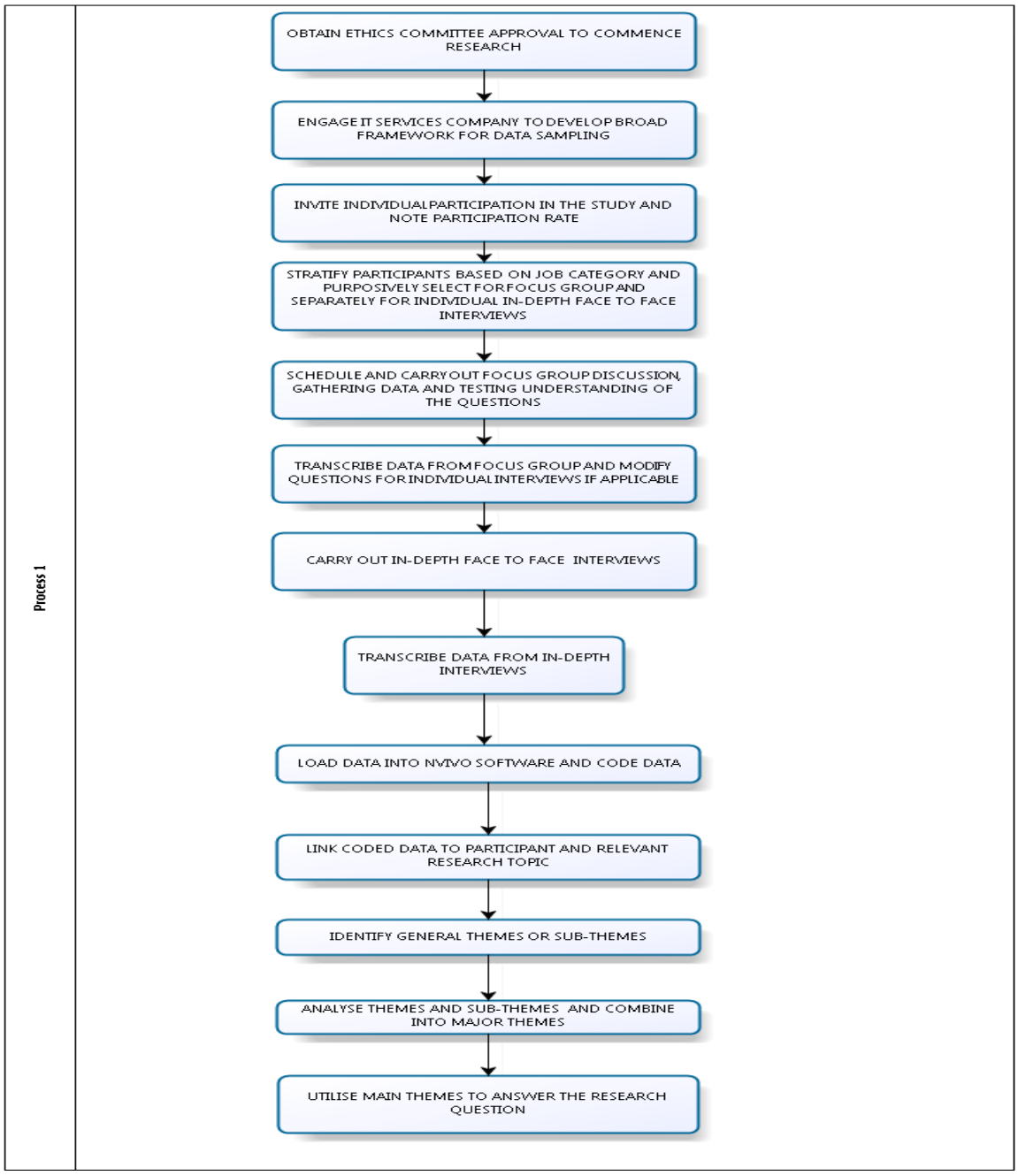
While qualitative research can occur in the natural environment of the organisation within the context of the human sciences, it should be noted that qualitative research is reflexive in nature, as the design of the data gathering and analysis can change as the research situation unfolds. Furthermore, methods of data collection and analysis are recognised as not being standardised. Furthermore, the process is normally accepting of some researcher bias, with a reduction of data being a necessary step in the development of meaning, based on the subjective intuition of the researcher

(Bluhm *et al.*, 2011:1871). The reflexive nature of this methodology was reflected in the need to incorporate a telephone interview due to the unavailability of one participant for the face-to-face interview as well as the raising of differently worded questions to match the flow of each interview. This did not however detract from the objectives of answering the research objectives.

Finally, it is not the intention to treat natural and human sciences as competing methodologies, but rather to see them as complementary, with the choice of method being determined by the initial research question, based on the research problem. In contrast to quantitative experimentation, the interview takes on the structure of a subject (the researcher) investigating another subject, as opposed to an object in quantitative studies. The research question in a phenomenological study centres on generating insights into and meaning of a particular phenomenon. The focus shifts to the experience of the individual, and not to a determination of how much or how many (Englander, 2012:17). Bluhm *et al.* (2011:1870) agree with this view in stating that qualitative research provides the opportunity to work with quantitative research in a reflexive approach, with each method contributing to solving issues raised by the other.

An outline of the different stages research design is shown in figure 3.1. While each step is important in its own right, a significant amount of intuition is required by the researcher in order to interpret the meaning behind the data provided. A significant amount of time is required for this process.

Figure 3.1: An outline of the research design



Source: Own compilation

3.3 POPULATION AND SAMPLING

3.3.1 Unit of analysis

In line with the phenomenological methodology (Gentles *et al.*, 2015:1780), the units of analysis were the individuals employed in a Johannesburg-based CRM software

reseller and implementation company that was chosen for the study. The company has 38 employees, made up of the following job categories:

- Management (5)
- Sales (6), of which 3 are telesales and 3 are channel sales
- Product support staff, phone support (6)
- Product consultants providing remote or on-site support (8)
- Software development staff, many of whom are based in distant locations (10)
- Finance and Administration (3)

The company offers a range of software solutions, including a CRM package which they are implementing in their own company. Apart from two members of the administrative staff, all other employees have been directly involved in the implementation of the CRM package, either at a strategic level (management), tactical level (product consultants) or operational level (sales, product support and software development).

3.3.2 Sample size

- Focus group

The sample size in this study needed to consider the use of both one focus group and in-depth (individual) interviews. In terms of the focus group size, an initial target of eight individuals was invited to attend. Individuals were selected with the assistance of the IT company director with the knowledge that some individuals may not be available on the final date selected for the focus group. This is in line with the suggestion of Dilshad and Latif (2013:194), who note that it is necessary to plan ahead for purposes of ensuring adequate resources are put in place, regardless of the final number that attend. They do however suggest focus group participant numbers of between 6 and 9, and describe the group as needing to be relatively homogeneous in order to generate discussion and reflect on the topic of concern.

There is however little consensus on the size of the group for focus-group interviews, but Cheng (2007:195) cites various authors as suggesting numbers of 6 to 10 citing Morgan, 8 to 12 citing Merton *et al.*, and 5 to 12 citing Fern. Noting the lack of

consensus on the size of the focus group, it must ultimately relate to the research purposes. It has however been shown that larger groups will provide more quality data, but up to a point, after which individual contributions will diminish (Krueger, cited in (Cheng, 2007:195). The final number of participants in the focus group in this study was 6, with one individual unavailable due to travel and a second due to work pressure on the day of the interview.

- In-depth (individual) interviews

In terms of sample size for in-depth interviews, Englander (2012:20) notes a common misconception about the need for a sample size to be large, in order to be able to generalise results to the population as a whole. He suggests instead that the focus should be on generating as much depth in the data from each interview as possible, as the questions relate to experiences, and not on how many individuals may have experienced the chosen phenomenon. Others have suggested that sample size be a factor of both theoretical and practical consideration (Robinson, 2014:29). Smith, cited in Robinson (2014:29), suggests a sample size of 3 to 16 participants for interpretive phenomenological analysis, with the top end of the range being applicable to larger-scale funded projects.

Sample size may also be determined based on the level of saturation achieved with the data collection process, but this is noted to be challenging as it requires a continuous process of sampling, data collection and analysis after each interview, as opposed to treating these as separate stages in a linear process (Baker *et al.*, 2012:4-11). These authors emphasise that quality and not quantity should be the focus of sample size, but suggest that the emphasis on quality should be across all aspects of the process from interviewing to analysis of the data.

Finally, Gentles *et al.* (2015:1782-1783) note that sample sizes in qualitative research are generally smaller, given the aim of this research – uncovering the depth and range of complexity surrounding a phenomenon and not intended to be representative of a population. They do however recommend approximately 12 participants as suitable for phenomenological studies. Having originally earmarked 16 consenting individuals

for the in-depth interviews, this study conducted 12 face-to-face interviews and one telephone interview.

3.3.3 Sampling strategy

A purposive sampling strategy was adopted to ensure participants had recently experienced a CRM implementation and had experience of CRM in other situations. The need to target a particular group of individuals was balanced with the practicalities of the researcher having access to these individuals at times that would be convenient to the participants.

A purposive sampling strategy is recommended by a number of researchers (Dilshad & Latif, 2013:195; Grossoehme, 2014:117) with Englander (2012:19) noting further that this approach should extend to the pre-selection of individuals for a focus group, given the need to ensure individuals have the necessary experience of the phenomenon. He notes that this is therefore a very different approach to attempting to draw a sample that is representative. The implication is that the researcher must have some idea of what factors might be at play within the phenomenon, as supported by (Robinson, 2014:31), but must at the same time be able to do away with these preconceived ideas and be open to generating or identifying a fuller meaning of the research topic. Cheng (2007:195) agrees with this approach, noting that it is important that participants feel comfortable discussing issues within the focus-group setting, and as such the group composition should be created with the intention of achieving a good group dynamic. The authors report no difference in the results when using or comparing results between strangers and acquaintances in a focus group.

Gentles *et al.* (2015:1775) support the idea of purposive sampling by defining sampling in qualitative research as “the selection of specific data sources from which data are collected to address the research objectives”. They note however that purposeful sampling is frequently stated as the method of sampling, but a consistent definition is absent. They therefore suggest that researchers add a description of their interpretation of the term within the context of their specific research. To this end, it should be noted that the current study focused on a purposive sampling strategy in an attempt to identify and interview individuals who had a range of CRM implementation

experiences, from being involved in and/or observing the implementation unfold within their own organisation and having had exposure to similar experiences by virtue of providing the software to other clients.

In following this approach, and once agreement to use the target company employees for the research had been reached, the researcher provided the prospective participants with an overview of the research objectives and invited each one to voluntarily participate in the study. Prospective participants were identified based on the likelihood of their being available; those not based in Johannesburg were ruled out due to the preference for face-to-face interviews. Of the 38 employees in the company, a total of 24 were identified as being suitable. This selection was achieved through discussions with a director of the company. All 24 employees were thereafter approached to confirm their willingness to voluntarily participate, and all but two confirmed their availability. It must be noted that employees may have felt obliged to participate, but discussions with the company emphasised the need to ensure that participants would take part of their own accord.

Finally, based on the positive responses to the invitation to participate, individuals were categorised based on their level of responsibilities within the organisation. This provided a strategic/management, a tactical and operational category. These categories were then used to determine participation in the focus group, in line with the objective of creating a group with adequate experience of the phenomenon under study, and the potential for positive group synergy. The remaining potential participants were then earmarked for the in-depth face-to-face interviews, based on ensuring as equal a mix across all categories as possible.

3.4 DATA COLLECTION

3.4.1 Interview format

Data collection was achieved by recording the full discussion from one initial focus group of six individuals, with a semi-structured questioning format, followed by 12 semi-structured face-to-face interviews and one semi-structured telephone interview. The focus group was used to test the understanding of the wording used in the questions and provide some indication of the initial themes that might be raised in response to the interview questions. It was found that there was sufficient

understanding of the question content and format to avoid the need for any change to the interview questions.

Interviews as a means of data collection have been reported to dominate qualitative research methodologies, followed in a distant second place by archival data analysis (Bluhm *et al.*, 2011:1877). In referring to focus-group interviews, these authors note that “interviews serve as a rich source for exploring people’s inner feelings and attitudes”. In particular they allow the researcher to gain insights into experiences not commonly shared (Dilshad & Latif, 2013:191). Cheng (2007:194) reports that focus-group interviews are more commonly confined to business research, but are intended to draw qualitative data from a group of specifically selected individuals in an appropriate environment under the guidance of a moderator.

Dilshad and Latif (2013:193) go on to suggest that focus groups should be prompted to respond to questions and stimuli raised by the moderator with the intention of focusing discussion on the topic at hand. They also note that the moderator plays a more active role in leading the discussion than in other interview approaches, and that the interaction amongst group members should be attributed an element of value in itself. They recommend that the moderator displays a range of characteristics that support a free-flowing discussion around the chosen topic, with some particular characteristics highlighted: being non-judgemental, respectful, and open-minded about the participants’ responses. The authors identify the benefits of the focus-group interview as including the interaction between group members, which expands on the input of the moderator. They however note that limitations may include an inability to find a time suited to all group participants, the potential for one or two members to dominate discussions, the potential for groupthink, and the negative impact of the moderator if he or she is not skilled at handling group interactions.

In terms of approaching the interview from a conceptual viewpoint, it is important that data be collected on the basis of lived experiences. To achieve this, the researcher needs to be able to take up a position within a subject–phenomenon relationship whereby the focus is not on the individual interviewee, but on their experience of the phenomenon. This applies in particular within the context of the phenomenological interview (Englander, 2012:25).

In adopting an interview approach using semi-structured questions, Englander (2012:27) suggests that the interviewer should avoid the temptation to overly pre-arrange questions, as this may lead the discussion, as opposed to directing it. He further suggests arranging preliminary meetings to generate rapport and trust, and deal with consent forms and other ethical issues. This time also allows participants time to review the research question. The downside may be an element of self-interpretation of the event, but he reports that this is not common. In light of this recommendation, consent forms distributed ahead of the interviews included an overview of the research objectives together with a brief background of issues relating to CRM. A number of participants reported this to be useful and contributed to their consenting to take part in the study.

All interviews, with the exception of one telephone interview, were conducted face-to-face as this provided the opportunity to develop greater rapport with the interviewees and should have promoted the collection of a higher quality of data compared to less personal approaches such as telephone interviews (Bryman *et al*, 2014:217). As already noted, all interviews took place at the participating company's premises. The company has a number of quiet, private meeting rooms that were suited to conducting the research. All data collected was of a primary nature.

3.4.2 The interview process

The interview process is the most critical part of the data collection process and as such there are a number of recommendations as to how this process should be undertaken. A number of these steps may have been discussed in previous sections, but for purposes of providing a complete picture of this process, these recommendations are re-affirmed. Al-Yateem (2012:33), for example, suggests that the interview process be preceded by the preparation of a broad guide to the interview, with the view to reducing the level of formality but without losing focus of the thread of questioning required. He further suggests that the researcher arrive early to prepare ahead of the arrival of the interviewee and ensure all facilities are in order. Cheng (2007:196) follows this up by providing a framework within which to prepare the questions for an interview. These begin with the point that all interview questions must

be understandable to participants and need to be clear and simple. He suggests these questions be constructed to be as colloquial as daily conversation, in order to assist participants to relate to the questions and to allow them to be recited. All questions should be open-ended, and each question should aim at one thing. Finally, the interviewer should avoid providing examples in order to avoid misleading the participant, and wherever possible ask for a reason as opposed to asking why a particular event may have taken place. Interviews in this study were carried out in a relaxed manner with participants to recall their experiences without any element of judgement as to the relevance of the answers, but discussion was steered back to the research questions if the discussion went off topic.

In addition to the structuring of the interview questions, it is further recommended that a sequence of interviewing steps be followed; this involves an opening question followed by introductory questions, transfer questions (to transition to the main topic) and then the key questions of the interview. The structure of the follow-up questions will depend on the structure of the interview itself (Cheng, 2007:196). In the case of the current research, the semi-structured interview approach meant that these follow-up questions were highly dependent on the answers provided to the core questions; but in a structured interview, these questions would be pre-determined and specific (Cheng, 2007:196). Given the number of core questions that this researcher was required to address, the interview structure in this study was less elaborate than the process recommended above. Apart from giving an overview of the topic, during which time an attempt was made to gain rapport with the participant(s) (Dilshad & Latif, 2013:195), questions were either core questions, addressing each of the 14 CSFs under study, or follow-up questions aimed at eliciting further detail or clarification from the responses provided to the core questions.

The researcher obviously plays a critical role in managing the interview process. The qualitative research interviewer needs to walk a fine line between extracting knowledge and respecting the ethical boundaries of the participant. Nonetheless, it is relevant to note that the interviewing style can have a significant impact on the quality of data obtained (Brinkmann, 2013:150). In this regard, he refers to “pollsters and probers” in terms of interviewing style, and suggests the appropriate approach lies somewhere in between. Pollsters run the risk of failing to uncover any new knowledge,

while probers may be prone to crossing ethical boundaries in their attempt to draw too detailed a response. Interview styles can be non-directive or confrontational, and can be assertive or receptive, with these being represented on a two-way axis. Finally, he reminds us that an interview must be considered within the meaning of the word – that is, it is a process of exchanging views at an inter-personal level. In line with the need to understand how participants had experienced the phenomenon of either successful or unsuccessful approaches to addressing the 14 CSFs for CRM implementation, participants were, wherever possible, asked what they had seen that had worked or not worked, in terms of each factor. As the objective of the study was to identify the practical considerations of what to address for each factor, it was not relevant whether the experience referred to was positive or negative; either way, the recognition of the experience highlighted the underlying issue as being of practical relevance to addressing the research question.

In line with suggestions by Bryman *et al.* (2014:220), but bearing in mind the words of caution from Brinkmann (2013:150) noted above, participants were probed and prompted to expand on their views to obtain the underlying concept or theme that underpinned their points of view. With one exception, all participants were able to offer their opinion and/or recall their experiences in regard to all questions, although questions around the issue of benchmarking proved to be the most difficult to answer. All participants were thanked for their contributions and were offered a summary of the findings, should they be interested.

3.4.3 Interview tools

Permission was sought from all interviewees to be electronically recorded, on the basis that while their participation was not anonymous, all data collected would be treated as confidential. While it is noted that recording interviews is of great benefit to the researcher, it is important to understand the potential influence this may have on the interviewee, and whether or not this affects the accuracy of data concerning the phenomenon being researched. It is possible that interviewees become less aware of the fact that they are being recorded over time, but it also remains possible that when being recorded individuals would rather present themselves in the best possible way, rather than commit to disclosing more detailed information. The recording may also contribute to exaggerating other potential effects, including the Hawthorne effect

(participants changing their behaviour when they know they are being observed), subject reactivity, which refers to the impact of the interview process on participant behaviour, and social desirability bias, which involves a reluctance to share what might be considered sensitive or personal issues (Al-Yateem, 2012:31-34). Dilshad and Latif (2013:196) support the notion that all recording devices should be used as unobtrusively as possible, while still informing interviewees that they are being recorded. In line with the suggestions above, the researcher made use of a small recorder which was tested ahead of each interview so as to draw less attention to its presence. As a back-up to the recorder, a cellular phone was used to record the same interview, with the cellular connection turned off. There was no noticeable negative response to these devices by any of the participants.

To assist with keeping track of the flow of the interview, flash cards (Bryman *et al.,* 2014:221*)* were used to remind participants of the topics under discussion in each of the three main question categories. The flash cards consisted of a list of the CSFs being researched, spread over three pages separated into strategic, tactical and operational CSFs. A standard interview guide was also used to maintain research focus in the discussions, but participants were given enough latitude to allow a free flow of ideas and sharing of experiences. The interview guide is shown in Appendix A.

A notebook was used at all interviews to capture any relevant observations concerning the participants or the interview process, in order to create a fuller picture of the data collection process. These notes are available but not shared, as it is felt the publication of these notes would reduce the level of anonymity that was offered to participants.

3.4.4 Transcribing of interview data

All electronically recorded interviews were transcribed into a Microsoft Word document in preparation for data analysis. Before transcription, all recordings were transferred to the researcher's computer noting the name of the participant (for the in-depth individual interviews), or the focus-group interview, as the file name. The focus group recording and the first six individual interviews were re-recorded verbatim onto the researcher's voice recorder to allow for electronic voice recognition transcription to take place. The process resulted in a ratio of between 1.5:1 to 2:1 in terms of the time taken to re-record the interviews, when compared to the original interview time. These

first draft transcriptions were then sent to a transcription service for editing; this also enabled the service to familiarise itself with the terminology used during the interviews. All transcripts were then verified by the researcher on return from the transcription service.

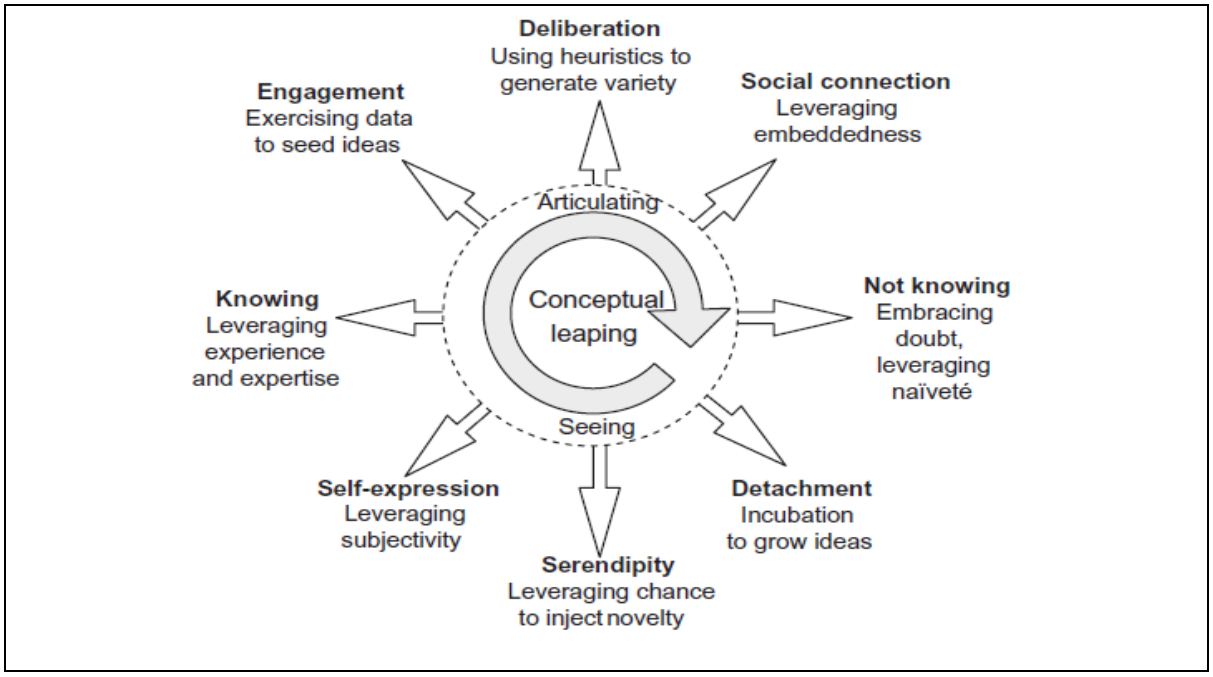
In terms of sanitising transcriptions and protecting the privacy of participants and associated companies, the recommendations of Grossoehme (2014:118) were followed whereby any names mentioned during interviews were replaced by with the letter “N” while all company names or software packages that might be linked to the company used in the study were replaced by a combination of three letters, such as “XYZ”.

3.5 DATA ANALYSIS

3.5.1 Introduction

Data analysis within a qualitative methodology relies heavily on the intuition of the researcher(s) to identify the meaning behind the data presented. The process of data analysis requires a range of different frames of mind in order to best uncover the underlying factors presented by the data. With this in mind, the use of a process of developing single or a series of conceptual leaps is suggested to bring an understanding to the data (Klag & Langley, 2013:150). In their article, the authors explain that these conceptual leaps can be seen as a means of contributing to discovery using a range of deliberate or abstract processes of thought. The underlying theme of the article appears to be to allow free thought to develop across the full spectrum of dialectic approaches, so as to not be confined to one path of discovery. Figure 3.2 shows the range of approaches to reasoning that might contribute to a more enlightened discovery of the answers to the research question. At the very least, applying the process of conceptual leaping has the potential to prepare the researcher for a more considered approach to data analysis, and one that is very much required for this phase of the study. The model in Figure 3.2 was used by the researcher as a reminder of the need to seek a deeper meaning to the data presented.

Figure 3.2: Framework for analytical reasoning in qualitative data analysis



Source:(Klag & Langley, 2013:152)

3.5.2 Data analysis and theme development

Raw data, having been captured via voice recorder and transcribed into written text, was coded to provide the basis for identifying key categories of data and general themes to assist in interpreting the experiences of the participants. Throughout this process it was important to maintain a link to the context in which the data was gathered (Bryman *et al.*, 2014:336). The ultimate intention was to display the data in a matrix to show the inter-relationships between the more prominent concepts developed from analysing the data.

Data was coded using the concepts outlined by a number of authors, all of whom suggest the same basic approach, but with a slightly different emphasis in places. Computer Aided Qualitative Data Analysis (CAQDAS) software (NVivo™) was used during the data analysis phase. The approach to the data analysis used was follows:

- Each transcript was read through with the intention of merely obtaining a feel for what was being said. The idea behind this initial reading was to gain a sense of the experiences of the participant in their own words. There was

no intention at this stage to code the data, but key points of interest from each interview were noted (Bryman *et al.*, 2014:337).

- Once the initial reading had taken place, coding of the text began. During this stage the most noteworthy words or phrases were selected to represent the experience or the meaning of the participant. This coded data may be referred to as a meaning unit (Giorgi, cited in Grossoehme (2014:117)). The interpretation of each logical piece of data was noted and referenced back to the position of the data in the transcript (Bryman *et al.*, 2014:337). Within the software used, all coded data is linked to a node and/or to a particular person or group of people. The nodes are in effect what most authors refer to as the themes, categories or sub-themes (Vaismoradi *et al.*, 2016:101).
- These themes provided the basis for establishing the answers to the research question.
- It is noted that coding in itself is not analysis. Coding is merely used as a means to bring order to the data available (Bryman *et al.*, 2014:337).
- Throughout the analysis there was a focus on interpreting the data with a view to answering the core research question of the study, but at the same time it was important to interpret the meaning behind the participants' words with a view to being able to articulate them as results (Bryman *et al.,* 2015:341).

Thematic analysis, as outlined above, is seen as an integral part of the qualitative research process. Vaismoradi *et al.* (2016:100-106) offer a further more detailed perspective on this process by noting that it must involve the identification of explicit content within the data so as to formulate categories, otherwise referred to as sub-themes. A process of interpretation of the categories is then applied to generate implicit and more abstract insights so as to develop the themes. Providing an understanding of the process and rationale for generating themes contributes to increased rigour and acceptability of the process of data analysis. The authors warn against themes being too descriptive, as this implies an incomplete data analysis.

In confirming a category as being a mere description of a participant's experience, Vaismoradi *et al.* (2016:102-103) highlight the fact that it is the theme that gives value to the category. By their account, data is transferred into meaning through a process

of coding, categorising, creating sub-themes (if relevant) and finally themes. They confirm that the themes become the subjects by which research questions are answered. Theme development relies to a large extent on intuition, but also follows a process of constant reflection which requires a researcher to repeatedly revisit the coding and theme development process. The authors refer to four phases of theme development, which are indicated in Table 3.1.

Table 3.1: The four phases of theme development

Phases	Stages
Initialization	Reading transcriptions and highlighting meaning units; Coding and looking for abstractions in participants' accounts; Writing reflective notes.
Construction	Classifying; Comparing; Labelling; Translating & transliterating; Defining & describing.
Rectification	Immersion and distancing; Relating themes to established knowledge; Stabilizing.
Finalization	Developing the story line

Source: (Vaismoradi *et al.*, 2016:103)

Immersion in particular sets the stage for identifying recurring or overlapping experiences that appear to be of interest or relevance to the researcher. This process seeks to identify both explicit and implicit ideas from within the data based on the researcher's perspective. The coding phase is merely aimed at reducing the volume of data to provide the researcher with a more workable database. (Vaismoradi *et al.*, 2016:102-103).

In continuing with the detailed review of the thematic analysis process, it is recommended that a clear pathway be indicated of the steps by which explicit data was interpreted to provide the more abstract implicit themes. While this will contribute to improved rigour, the use of research notes should be seen as an integral part of reflexivity. This allows for the process of constantly checking the researcher's assumptions. It also assists in understanding or recalling how meaning was generated from the data. Classifying codes requires a process of aggregating a number of codes based on their similarities, but with one specific rule: that of ensuring that each code is assigned to only one classification group, based on the best match. The more

frequent a particular pattern of code grouping occurs, the more likely it is that these will develop into a theme. Frequency should not, however, be more important than meaning, particularly with respect to answering the research question. Labelling should aim at identifying a word or phrase that best describes the idea generated from the various codes (Vaismoradi *et al.*, 2016:104-105). The CAQDAS software used in this study allowed for immediate referencing of any coded data back to the interview transcript so as to reconfirm the context within which the coded data was made. The software also allowed the researcher to combine or re-assign coded data to different themes where new meaning was interpreted during the process of reflection.

Vaismoradi *et al.* (2016:106) continue by describing the rectification phase as taking a step back from what might be considered the final product to eliminate or reduce the chance of incomplete analysis. Stabilising is a process that shows the interconnectivity between themes or sub-themes and how these relate to the topic of study. Finally, in the finalisation stage, the articulation of the various themes is constructed to answer the research question. The use of hierarchical charts, presented in detail in Chapter four, allowed the researcher to have a visual view of the themes developed for each CSF, and stimulated a process of rectification before attempting to answer the research questions.

As mentioned previously, the above process was managed using a CAQDAS software package, the background to which is provided in the next section.

3.5.3 Computer-aided qualitative data analysis

Computer-assisted quality data analysis has been in existence since the early 1980s, with NVivo™ being amongst the more popular programs in use today. As tools for assisting qualitative data analysis, CAQDAS packages are not prescriptive and allow the application of different data analysis approaches (Kuş Saillard, 2011:2). Woods *et al.* (2016:598) confirm CAQDAS software's history by noting that first-generation programs were developed in the 1980s and offered the opportunity to provide greater capacity for coding, retrieving, and analysing data compared to previous paper-based or manual systems. There are, however, concerns that the packages may restrict researchers in their methodological approach to qualitative research, and may unduly influence a researcher's practice, should there be a loss of reflexivity due to the use

of the software. Their study therefore aimed to contribute to a better understanding of how these packages are used, with particular reference to NVivo™ and Atlas-ti™ software.

Woods *et al.* (2016:604) notes a 50% increase in the use of software packages in 2012, with these packages being used primarily for the analysis of interviews and focus groups. The primary use was reported to be in analysis for coding and the development of themes, and for the diagrammatic representation of concepts developed from the data. This primary use extends to the coding and retrieval of data, the differentiation of coded data by participant characteristics, and investigating conceptual relationships. They also showed that researchers used the programs to show a higher level of transparency around the process by which coding took place and how these were linked to final themes. They suggest a greater use of this reason for using CAQDAS. Finally, they note there is little evidence of researchers adapting their approach to suit certain features of the software, with full transcription of interviews remaining a common practice.

3.6 ASSESSING AND DEMONSTRATING THE QUALITY AND RIGOUR OF THE PROPOSED RESEARCH DESIGN

With the increase in the use of qualitative research methodologies, there is a growing emphasis on how studies of this nature can improve their quality and rigour. One approach to achieving this may be for researchers to adopt a higher level of methodological description to allow for the possible replication of a study (Bluhm *et al.*, 2011:1879). While there is little consensus on the means by which qualitative research can be assessed, there are two broad schools of thought that are suggested as being relevant. These are a focus on methodology (Dixon Woods), and the approach of Lincoln, which emphasises the need for rigour during the process of data interpretation (both cited in Leung (2015:325)).

A number of authors have attempted to be more precise around issues of validity, reliability and generalisability. For example, Yardley (2000:219) proposes the approach outlined in Table 3.2.

Table 3.2: Characteristics of good qualitative research

ESSENTIAL QUALITIES	POSSIBLE FORMS FOR EACH QUALITY
SENSITIVITY TO CONTEXT	Theoretical; relevant literature; empirical data; socio-cultural setting; participants' perspectives, ethical issues
COMMITMENT AND RIGOUR	In-depth engagement with topic; methodological competence/skill; thorough data collection; depth/breadth of analysis
TRANSPARENCY AND COHERENCE	Clarity and power of description/argument; transparent methods and data presentation; fit between theory and method; reflexivity
IMPACT AND IMPORTANCE	Theoretical (enriching understanding); socio-cultural; practical application

Source: Adapted from (Yardley, 2000:219)

Making use of the above suggestion, Robinson (2014:38) suggests that addressing each sampling issue (setting a sample universe, setting a sample size, developing a sample strategy, and sample sourcing), and providing transparency around the rationale for each issue contributes to the validity of the research. Validity is determined by sensitivity to context, which, by clearly defining the sample universe, will limit inappropriate generalisation of results. An explanation of the rationale for the purposive sampling approach in this study has been provided. This addresses issues relating to context sensitivity.

Robinson (2014:38) also notes that sensitivity to rigour can be achieved by a focus on determining sample size, not by the number of participants *per se*, but by the ability of the sample to provide the data for a comprehensive analysis. She continues this argument by noting that transparency relates to the rationale and processes followed in attending to the four factors regarding sampling, and in particular any influence the researcher's own background had on selecting participants. The participants in this study have experience of their own CRM implementation as well as many combined years of experience in implementing CRM systems in other organisations. It was believed that this would provide participants with the necessary experience to provide meaningful insight into the research topic. Finally, sensitivity to impact and importance should allow for "theoretical or practical relevance beyond the sample used", and in particular there should be an understanding of for whom the study may be important (Robinson, 2014:38). In this regard, this study aims at identifying factors that will assist

organisations to be more successful in the implementation of a CRM system. The study also aimed at assisting software vendors and implementation partners to be more effective in their relationships with organisations with whom they may contract for the implementation of CRM.

Grossoehme (2014:111) argues that validity refers to “whether or not the final product truly portrays what it claims to portray”, whereas reliability refers to “the extent to which the results are repeatable”. In making this argument, he notes that member checking enhances validity while reliability can be enhanced by articulating research decisions throughout the process, so as to provide the researcher’s rationale for each decision. (Leung, 2015:325) differs in his interpretation by suggesting that validity in qualitative research can be defined in terms of how appropriate the various components of the study are to one another. For example, is the design valid for the methodology? He goes on to define reliability within qualitative research as lying with consistency, as an element of variability in the results is tolerated, if not almost expected. Consistency is provided wherever possible through a process of data triangulation. Qualitative research has traditionally not been expected to be generalisable, but with a drive for higher levels of meta-analysis, it is suggested that generalisability be addressed through the same means as for validity. It is the view of the researcher that the design of the study is aligned to the methodology and therefore contributes to validity. Research decisions can be verified through an interrogation of the rationale for theme construction as provided for by the CAQDAS software used in the study. This contribute to reliability.

3.6.1 Researcher risk

The researcher was aware of the potential for bringing personal bias to the line of questioning and the interpretation of the results. The researcher was also aware of the need to create a level of trust between himself and the study participants, and as an outsider he attempted to gain a thorough insight into the context within which the study took place. Confirmation of the accuracy of interpretation of data was achieved through a review process involving feedback sessions with participants, during which an opportunity was provided to corroborate or correct the essence of the data.

3.6.2 Participant risk

Participants were provided with the background to the reason for the research and the potential benefits to themselves, in an attempt to encourage full and unbiased responses to the questions posed. The potential for artificially favourable responses being provided by lower-level employees while in the presence of management was managed by the participant selection process for the focus group and by the use of individual interviews across all levels of the organisation. Wherever possible interviews were carried out in the mornings when participants were likely to be in their most creative mood (Benedetti *et al,* 2015:40). Field notes were captured for every interview to confirm the context for each interview.

3.6.3 Social context risk

Interviews took place in private meeting rooms on the premises of the unit of measure for the study. All members of the focus group were known to one another and were part of the same organisation. Participants were pre-selected to ensure they were likely to generate a positive group dynamic during the interview. The privacy and confidentiality of the individual interviews was emphasised to elicit full and honest insights into the research topic.

3.6.4 Risks in data collection and analysis

Participants differed in their level of understanding of the research topic and differed in the level of confidence with which they recalled their experiences. It was therefore important to focus on what was being said (content) and not on how it was said (emotion) to avoid focusing on certain insights at the expense of others of equal potential value. The triangulation of data is a key part of the thematic process, with key themes only justifiably identified based on data observed from a number of different sources. The focus group was utilised in order to provide an element of validation of the comments made, as participants were expected to challenge data that was conceptually invalid. The individual interviews, on the other hand, provided a greater depth and breadth of data collection to increase the likelihood of generating triangulation of the data.

3.7 RESEARCH ETHICS

This study was undertaken within a private organisation and may have uncovered facts or insights that may put the organisation in a bad light should they be publicly linked to this organisation. The integrity and confidentiality of this information must be maintained at the highest level. Furthermore, individuals may have expressed insights or comments which may not be viewed in a positive light by the management of the organisation, and it was important that both management and individuals were made aware that all data collected was of a confidential nature and would not be linked to a particular named individual in any results or data analysis made available through this study.

Annexure B shows the informed consent form that was used in the study. The research was further guided by the principle that it should be based on a thorough knowledge of the scientific background and a careful assessment of risks and benefits; have a reasonable likelihood of benefit to the population studied; and be conducted by suitably trained investigators using approved protocols, subject to independent ethical review and oversight by a properly convened committee. Ethical clearance for this study was requested and granted by the Faculty of Commerce and Administration Research Ethics Committee at the North West University. The ethical clearance form is shown in appendix C.

3.8 CHAPTER SUMMARY

In this chapter, the methodology and rationale for the research design was presented. The influence of the qualitative methodology using an interpretive phenomenological philosophy was noted. The process of sampling and undertaking of interviews was explained. The background to development of CAQDAS packages and their use in qualitative research was explored and the role this software played in the data analysis was explained.

CHAPTER 4

4. RESULTS AND DISCUSSION

4.1 INTRODUCTION

In this chapter, the reader is presented with the findings of the research, based on the analysis of the transcripts from the interviews performed. The results are presented in the form of the major themes identified for each CSF, with sub-themes shown where applicable, to provide an indication of the background to each theme. The chapter is structured so as to present the results and discussion for each individual CSF. The demographics of the interview participants is presented to provide context.

4.2 DEMOGRAPHICS

A total of 19 individuals took part in the study with six participants in the focus group, and 13 taking part in individual interviews. Demographic data relating to the sample population is shown in Table 4.1 for focus-group participants and Table 4.2 for individual interviews. Demographic data includes the participant's gender, their age group, the organisational level of their job and an estimate of the number of years of CRM experience.

Table 4.1: Participant demographics – focus group

PARTICIPANT	GENDER	AGE GROUP	ORGANISATIONAL LEVEL	YEARS OF CRM EXPERIENCE
1	FEMALE	35 – 39	TACTICAL	6
2	MALE	25 –29	OPERATIONAL	2
3	FEMALE	40 – 44	MANAGEMENT	3
4	MALE	35 – 39	TACTICAL	7
5	FEMALE	30 – 34	TACTICAL	6
6	FEMALE	30 – 34	OPERATIONAL	<1

Table 4.2: Demographics for participants from individual interviews

INTERVIEW	GENDER	AGE GROUP	ORGANISATIONAL LEVEL	YEARS OF CRM EXPERIENCE
INTERVIEW A	MALE	40 – 44	MANAGEMENT	11
INTERVIEW B	MALE	45 – 49	OPERATIONAL	<1
INTERVIEW C	FEMALE	30 – 34	OPERATIONAL	<1
INTERVIEW D	FEMALE	35 – 39	TACTICAL	4
INTERVIEW E	MALE	40 – 44	MANAGEMENT	15
INTERVIEW F	MALE	35 – 39	OPERATIONAL	2
INTERVIEW G	FEMALE	40 – 44	TACTICAL	<1
INTERVIEW H	MALE	20 – 24	OPERATIONAL	3
INTERVIEW I	MALE	30 – 34	TACTICAL	4
INTERVIEW J	MALE	25 – 29	OPERATIONAL	<1
INTERVIEW K	MALE	50 – 55	MANAGEMENT	18
INTERVIEW L	FEMALE	35 – 39	TACTICAL	3
INTERVIEW M	FEMALE	35 – 39	OPERATIONAL	<1

4.3 PRESENTATION OF RESULTS

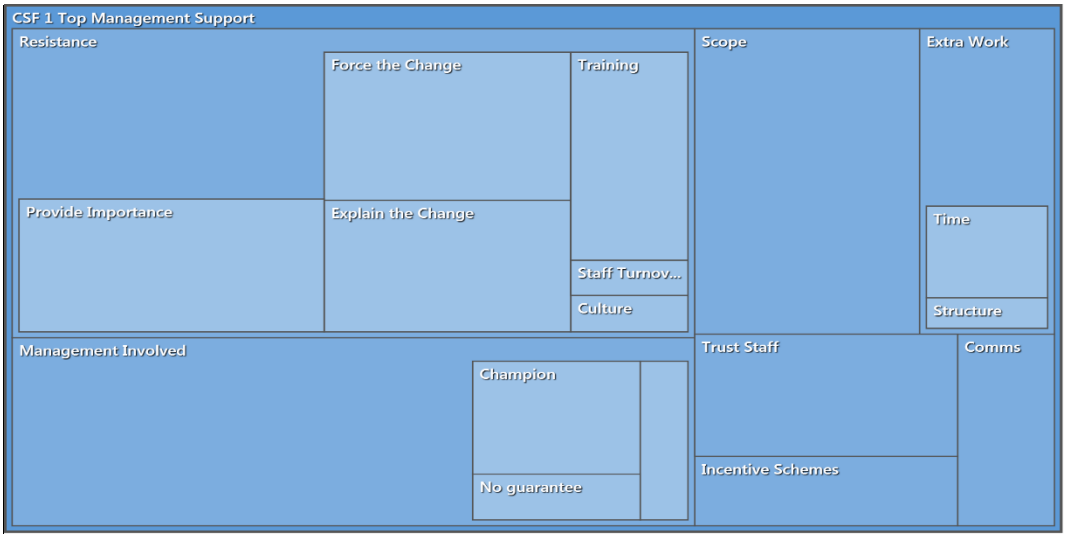
Data from the focus group and the interviews were analysed with the view to identifying practical actions that should be considered under each of the 14 CSFs. The major themes and sub-themes for each CSF are presented using a “hierarchical chart”. These charts provide a visual representation of the relative importance of each theme identified within each CSF. Themes are shown within the charts as the darker shaded blocks with sub-themes, where applicable, shown nested within each theme block in the lighter colour. Due to space limitations, the headings for some minor sub-themes are shown as truncated. This does not affect the discussion of results. Based on the depth of data, certain CSFs of the broader CRM implementation project have been identified as being of a higher priority, and these are identified accordingly. Relevant

quotations from interviews have been used where appropriate and have been referenced to the interview code. The job level of the relevant respondent is also noted for each direct quote.

4.4 TOP MANAGEMENT SUPPORT

Respondents indicated that a major need was for top management to understand that their role in a CRM implementation should be one that focuses on managing the natural levels of resistance to change that are likely to occur within the organisation. In particular, a consistent view put forward was that top management need to take the lead in elevating the level of importance of the project to the organisation, by not only constantly re-affirming the need for the change, but to also playing a strong role in making it clear that the CRM project was a very definite part of the organisation's future. These two sub-themes are shown in Figure 4.1 as "Explain the change" and "Force the change" respectively.

Figure 4.1: Hierarchical chart for top management support



Source: Own compilation

Respondents felt that without this firm direction, employees are likely to adopt highly variable levels of CRM usage and thus threaten the potential success of the project. This view is best captured by the following:

> If you don't get everybody on board and somebody driving that or, enforcing is the wrong word, but it is enforcing, just this is how it is, it's very black and white. Yes, that's probably where it either succeeds or fails. Interview E (Management Level)

This view was not restricted to management level; respondents across all levels indicated that they would themselves respond more favourably if the direction were clear and not negotiable. Regular and consistent communication from top management, as well as an indication of management's understanding of the issues faced by employees, was also seen as likely to enhance CRM project success. This approach is supported by Sebring (2016:28) who suggest that while it is recommended to prepare staff beforehand with plenty of communication to generate an understanding of the rationale for launching a CRM, the use of the CRM must be seen as mandatory and as part of the business going forward (Sebring, 2016:28).

These findings are also supported by Brown (2016:2) who noted that top management need to be clear about the role they will play in contributing to CRM success and must understand the need for and be prepared to commit time and resources, not only during the implementation, but also prior to starting the project.

Top management support was also seen as being delivered through a direct and visible involvement by management in the project. Respondents accepted that management is unlikely to be involved in the day-to-day processing of data or use of the CRM system, but do need to find ways to show that they are involved and sharing in the journey towards the adoption of the new system. In terms of showing their level of commitment to the project, a recurring recommendation was not only to appoint a project manager (sub-theme "Champion"), but to ensure that the project manager was provided with real authority to drive all aspects of the implementation.

> And if you've got someone who is just a project manager and it's their job to push them through the system, what authority does that person have? Can they make the CEO do training? Can they make the CEO do it? If not, is it going to work? Interview L (Tactical Level).

As a CRM implementation partner, the organisation in this study has taken the view that providing the project manager with the appropriate levels of authority is now a prerequisite to taking on a new client. This appointment of a project leader is supported by Christenson & Walker (2014:42), but they note that the project leader must still engage widely to involve a broad range of stakeholders. Respondents did confirm however that top management can show their support by appointing and providing the project manager with the appropriate level of authority and

communicating this fact to the organisation. It was noted this should be an imperative for any project.

> So, if there is no project manager, then I won't take that business as easy. I insist now on having a project owner on their side. Interview K (Management Level).

4.5 COMPANY CULTURE

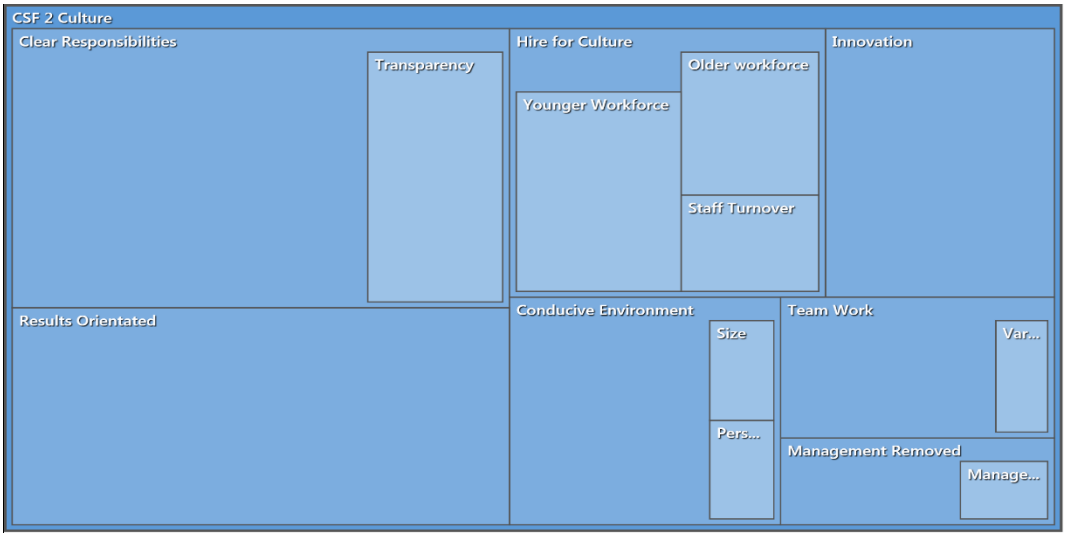
The line of questioning concerning the CSF of organisational culture centred on how the organisation might be able to create a culture that is more conducive to CRM implementation success. It is accepted from the literature review that the overriding culture has an influence on CRM project success, but the objective of this study was to consider how it might be practically possible to influence the culture to be more supportive of the project. To this end, responses indicated that creating a culture that focuses on ensuring employee responsibilities are clearly outlined, as well as a strong results orientation, will lead to improved CRM success. These two themes are shown to dominate the responses summarised in Figure 4.2.

Further to the focus of responses being centred on defining responsibilities, it was also noted that an organisation should prepare itself for greater levels of transparency after implementing a CRM system. This is due to the greater visibility provided by such a system, which will need to be managed from two points of view. Firstly, respondents indicated that employees need to be encouraged to collaborate with one another to gain optimal benefit from the system. This is best supported by the following:

> I think a culture that is not collaborative, so if people don't like other people being able to see what work they're working on, because I think these kinds of systems do make everything look more open. Interview L (Tactical Level)

Secondly, and possibly linked to a number of other CSFs, tactical and operational level respondents indicated that management needs to be careful not to be seen to elevate the primary function of the CRM to that of managing individual employee performance. Management levels appear, however, to see the CRM as a performance management tool. One operational-level employee indicated a higher level of understanding of the need for monitoring individual performance once it had been explained that the manager needed the performance metrics in order to motivate for incentives and bonuses.

Figure 4.2: Hierarchical chart for company culture



Source: Own compilation

The focus on “Clear responsibilities” and “Results orientated” does not discount the need for higher levels of innovation and acceptance of technology, but these themes would be difficult to impact through the CRM project. They are likely to be deeply embedded aspects of the culture and may be related to the age of the workforce, as indicated by the following:

> So, think it’s quite difficult, what helps is if it’s a lot of younger people or just people who have quite innovative ideas, that helps, especially with CRM because if I take my client that we implemented, "ABC Co"; that’s a marketing company and yes they just love the programme there are open their culture is just right for CRM. Interview D (Tactical Level)

A number of respondents echoed the same issue of employee age, but from a practical point of view this aspect of the business will be dealt with in time, as younger employees are hired or as older employees become more comfortable and familiar with the technology. Understanding the make-up of the organisation’s workforce will however provide an understanding of how supportive the culture may be of adopting CRM and should assist in managing implementation risks.

4.6 DEVELOPING A CLEAR CRM STRATEGY

Data collected in response to questions surrounding CRM strategy development was relatively low in depth. As interviews were conducted across all levels of organisational structure, a number of respondents appeared unclear how a CRM strategy may be

developed. As shown in Figure 4.3, most of the responses confirmed the need to align the strategy with a formal needs analysis (Needs analysis) and to clarify or define organisational objectives (Define outputs) before embarking on the strategy development. Responses indicated the need to be prepared to change the organisational structure to support the strategy.

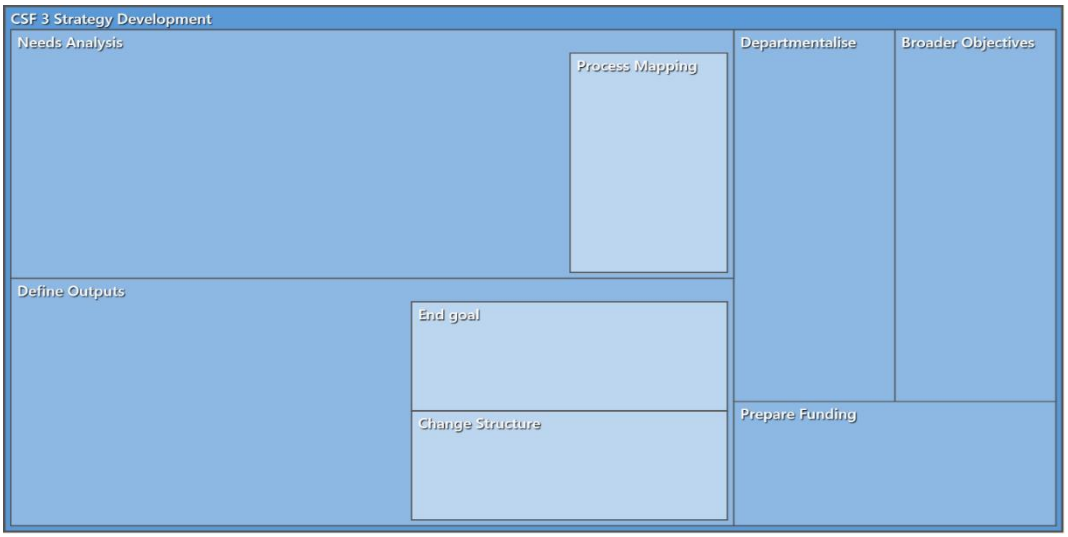
The focus group in particular were highly supportive of the needs analysis approach, but tended to focus more on the specific CRM analysis as opposed to incorporating CRM into the broader organisational strategy. This may highlight a potential threat to CRM implementation, in that it is seen in isolation from the organisational strategy. This is supported to an extent by the following response to a question on the extent to which organisations take a broad view in terms of strategy development.

No, they generally don't and I think that is more focused, it is the marketing team and the sales team or maybe just customer services and it is not everyone else. Interview K (Management Level)

At an operational level, a number of respondents noted that they had seen effective implementation of the strategy when the strategy was departmentalised. This they felt provided each department with the opportunity to adopt the programme to suit its specific needs, and is supported by the following example:

It's important from the top down to as they invest in it, segment it, strategise around it so that they can funnel the information to the correct departments. Interview G (Tactical Level)

Figure 4.3: Hierarchical chart of developing a clear CRM strategy



Source: Own compilation

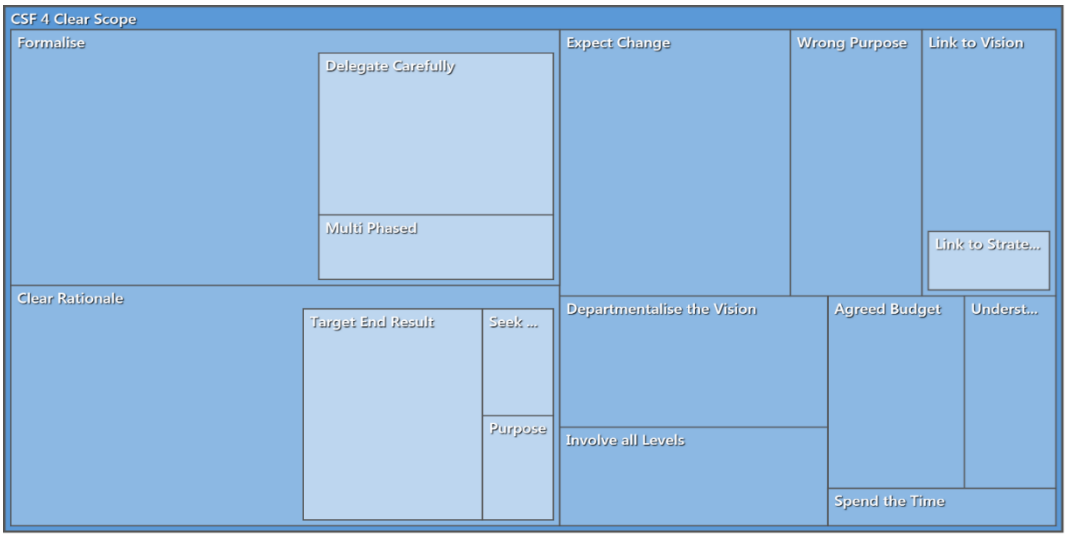
4.7 CLEAR CRM PROJECT SCOPE OR VISON

The development of a project scope is a logical part of any project implementation and is not disputed as a CSF. Data was however analysed in an attempt to identify the specific issues that need to be addressed to ensure this CSF is effectively dealt with in terms of CRM implementation success. This becomes relevant as Woolridge *et al.* (2009:151) note that defining and gaining acceptance for project scope provides for greater resource support, as the goals are clear as is the rationale for allocating resources. They note that undefined project scope can lead to the withdrawal of support for funding when management is not clear whether or not a project is delivering as expected.

Figure 4.4 shows the main themes that were identified from the data for this CSF. The most important aspects of preparing the project scope were identified as adopting a formal approach (Formalise) and ensuring there is a clear rationale for the project as a whole (Clear Rationale).

Formalising the approach allows an organisation to consider the wide range of factors that might impact on the project's success, including issues such as departmental and individual employee levels of access. Above all else, however, respondents felt that the formalised approach provided all parties with a level of protection in terms of defining project outcomes.

Figure 4.4: Hierarchical chart for developing a clear project scope



Source: Own compilation

Underlying this protection is the commitment that all parties make to agreeing precisely who is responsible for which actions (Delegate carefully). The delegation of roles and responsibilities needs to cover both internal and external partner personnel. Having parties understand that there is a formal sign-off of these objectives provides the motivation for an appropriate amount of time to be invested in this process (Spend the time). The focus group in particular were clear about the need for an investment in formalising the scoping process, with comments such as:

> The scope document protects both parties, it will protect the client and it will protect the consulting company. Focus Group

and

> If the client is complaining that you haven't done this then you go back to the scope document and you see that actually, that wasn't detailed in there, it just gives clarity, it's transparent. Focus Group

More than providing the protection, the scoping process suggested to be used to enable an exchange of views from across the organisation (Departmentalise the vision and Involve all levels) as well as leading to a realistic budget for the project (Agreed budget). It was also noted that organisations should accept and be prepared for changes to the project scope (Expect change), but should agree ahead of time where possible, to allow for any major shift only as part of another phase of the

implementation. A failure to take this approach was felt to put the project at risk, as a key aspect of the formalised approach is to agree on specific milestones to be achieved, and signed off on, before proceeding with the project.

As will be noted from the results of the data analysis covering other CSFs, a number of issues raised from these other factors link back to the project scope. Based on this data, the project scope must therefore be considered one of the more important CSFs for CRM implementation. This may be understandable given the second major theme identified above, that of having a clear rationale for the project (Clear rationale). This may be best summed up by the following comment:

> You can't implement anything unless you have a clear objective at the end, you can but chances are there's going to be a lot of over-expenditure, there is going to be a lot of time wasted, a lot of frustration, a lot of negativity around. Interview G (Tactical Level)

Linked to this approach is the underlying need to consider business objectives in full and build the project scope around those objectives. The implication of this approach is that the CRM should be developed as an answer to questions about organisational strategy and then project scope. Providing a clear rationale for the project will further assist in linking outcomes to individual performance outcomes. Finally, it was indicated by respondents that organisations do, and should, make use of implementation partners to assist in the scoping process as there is an obvious need to match organisational needs with system capabilities.

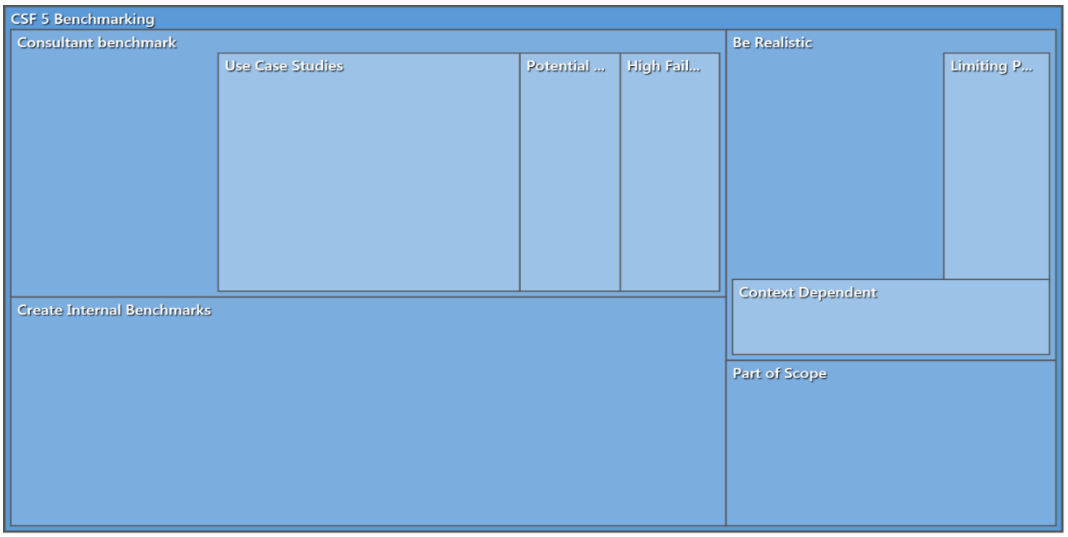
4.8 BENCHMARKING

As a CSF, benchmarking was the most difficult to analyse given the generally low level of consideration given by respondents to this factor. A number of respondents actually viewed using benchmarks as being counterproductive by limiting an organisation to a certain set of standards that may by all accounts be outdated anyway (Limiting performance, as a sub-theme of Be realistic). The theme structure for this CSF is shown in Figure 4.5. There was however greater consensus around the need to make use of implementation partner knowledge (Consultant benchmark) to establish benchmarks for project implementation guidelines, including the use of case studies to set realistic project timetables as well as general project structure. This is best supported by the following comment:

I have also had it where they ask for our advice, because we work with different companies and we have done this before, what is your advice, what have you seen at different companies. Focus Group

While acknowledging the low level of use of external benchmarks, respondents were however supportive of creating internal benchmarks. It was suggested that these internal benchmarks were useful once the CRM was implemented, but needed to be dynamic to take account of the new capabilities of the system. One final area where benchmarking was seen as effective was in the development of service level agreements, although these were seen as supporting the management of partner performance rather than challenging the organisation itself to achieve higher standards.

Figure 4.5: Hierarchical chart for benchmarking



Source: Own compilation

4.9 EMPLOYEE ACCEPTANCE

The CSF of employee acceptance received a relatively high level of response, with data indicating this factor to be one of the more important to consider for a CRM implementation. With this CSF being the first of those at the tactical level, it is no surprise that there is some overlap between issues raised in response to questions regarding employee acceptance, and those relating to strategic factors such as top management support and project scope. For example, the major themes within the

employee acceptance CSF, such as “Change management” and “Clear objectives” appear to match those identified within top management support and clear project scope respectively. It will however be shown that there are subtle but important differences between the two levels in terms of application. In particular, while top management support was identified to a large extent as needing to influence resistance to change by leading by example, within the context of employee acceptance, the data suggests that management need to ensure high levels of cross-company involvement, well before the project begins. This view may be best summarised by the management and operational comments noted as follows:

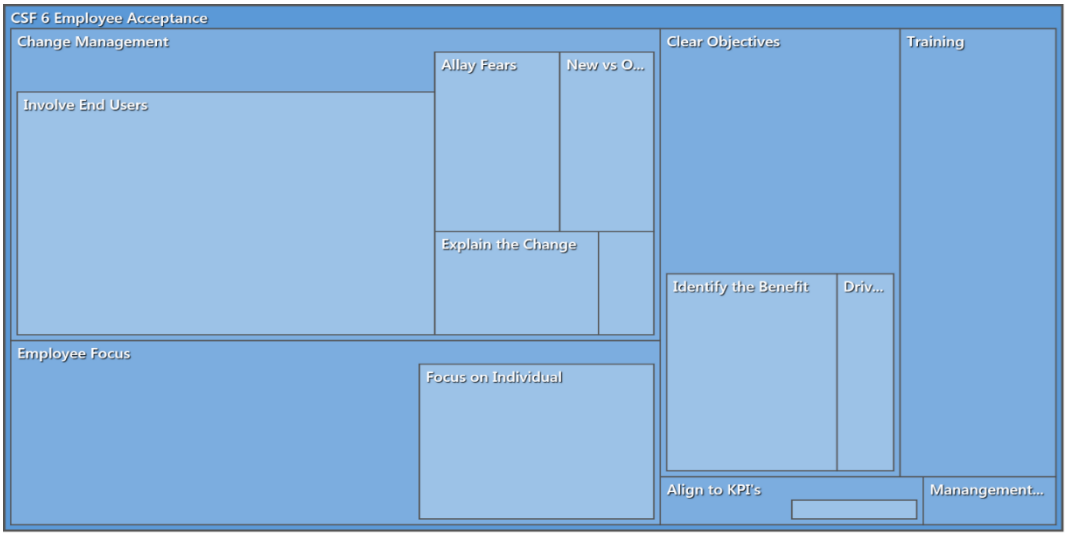
> Then you have got the staff input from the beginning and it also alleviates some of the organisational culture stuff because they say, they are doing this with my best interest. Interview A (Management Level)

> I think finding out what people need so if CRM is even an option for them, that’s even more important than the organisation looking from the top down and deciding if we need CRM or not.
> Interview J (Operational Level)

Respondents were highly supportive of the importance of finding ways in which employees can become involved early on in the project, in particular end-users of the system. Shaul & Tauber (2013:20) support this approach by suggested that employee issues be addressed as early on in the planning phase of the project, to reduce the potentially negative effect a lack of employee acceptance will have once the project starts.

Figure 4.6 also highlights the need to find ways in which the organisation can “Explain the change” and “Allay the fears” associated with the proposed and subsequent introduction of the CRM system. Respondents felt that these issues needed to be addressed at both organisational and individual employee level (“Focus on individual” as a sub-theme of “Employee focus”) and would like a greater involvement of middle management in this process. Jafari-Navimipour & Soltani (2016:1063) suggest that at a practical level, gaining employee acceptance can in part be achieved by addressing issues in the user environment, such as access to information and softer issues such as job security.

Figure 4.6: Hierarchical chart for employee acceptance



Source: Own compilation

Respondents indicated that in the early stages of the implementation, employee focus needed to be on reinforcing the benefits of the new system at the employee level, as this stage of the implementation is viewed as important in terms of employee acceptance.

Then you try and show them how the new system is going to try and make their life day-to-day easier, that helps to get employees to accept that. Interview D (Tactical Level)

The clarification of objectives was highlighted as important, not only to identify the benefits expected from the new system (Identify the benefit), but also to allow management to drive the changes by providing specific targets to be met (Driven from above).

Finally, “Training” as an individual theme is seen as contributing heavily to employee acceptance, but is discussed in more detail as a CSF in its own right. The importance of training to generating employee acceptance might however be best summed up by the following:

Because my experience is the biggest challenge of going to a new system is a fear of the unknown. So, if training is handled properly then you eliminate the biggest resistance to change.
Interview D (Tactical Level)

4.10 SOFTWARE SELECTION

While a number of technical issues were highlighted as needing attention, the dominant theme expressed by respondents was that software selection is first and foremost a business decision (Software fits business). This is supported by the literature view that software selection is considered a tactical, and not a strategic, issue and highlights the role of technology as an enabler rather than being central to project success (Garrido-Moreno *et al.*, 2014:1039). The requirement for the business needs to be clearly identified ahead of software selection is best summed up by respondent views as follows:

> It's more about not a specific CRM project or CRM function we looking at but more of what we want out of CRM and being able to develop that. Interview J (Tactical Level)

and

> So, we can actually close yourself off to the software and focus on what you want to achieve. Interview D (Tactical Level)

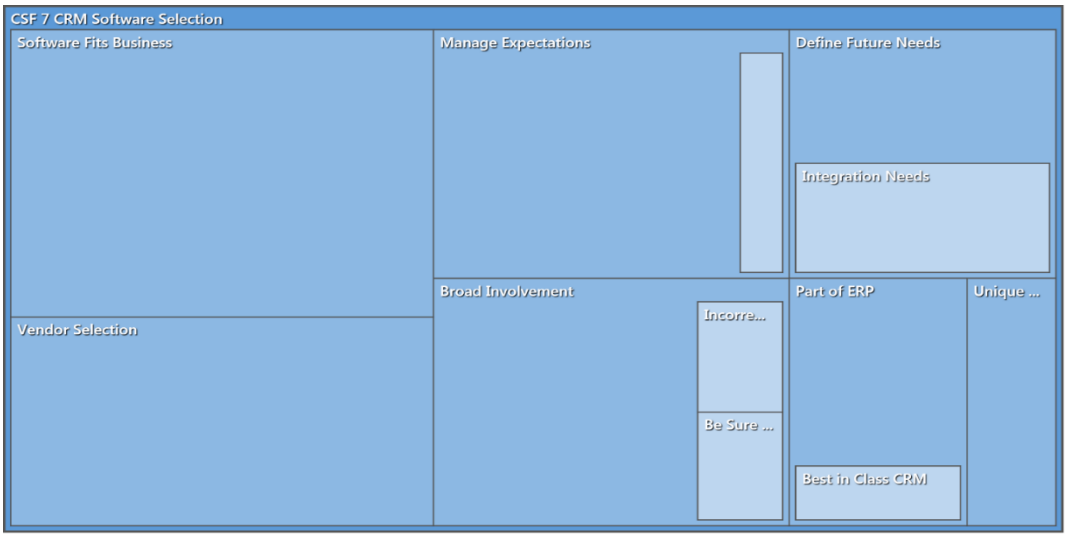
Respondents also highlighted the view that the requirements of many organisations are unique, and a successfully deployed software package in one organisation may not translate as a match for another. Furthermore, the interview data confirms that a wide range of software options exist, and clear knowledge of the organisations needs with regard to functionality and architecture will eliminate those packages that are not suitable. The theme structure for this CSF is shown in Figure 4.7.

"Vendor selection" was noted as being important, but two aspects in particular were identified as needing attention. These were, firstly, to consider the number of different vendor options available to avoid being limited to dealing with a particular vendor should the relationship deteriorate, and secondly, to ensure there is a cultural fit between the implementing organisation and the vendor. As a precaution, respondents warned that some vendors may be less than honest in outlining the capabilities of their particular software. As a response to this threat, Estrada (2015:53) proposes a focus on developing the system upfront and not being unduly influenced by added extras that may be emphasised during the selection process. Respondents felt that by delegating software selection to a cross-sectional team (Broad involvement), which includes IT and operational personnel, risks associated with incorrect software

selection can be reduced. Furthermore, interview data indicates that organisations need to be realistic about the capabilities of CRM software systems to avoid over-complicating the selection process (Manage expectations).

Two final aspects identified as needing attention are the themes of “Define future needs” and “Part of ERP”. Defining future needs is identified as being relevant not only to software functionality, but also to the architecture or platform on which the programme will operate. In particular it was noted that desktop options are less costly, but should there be a need for web-based functionality in the future, then this should be considered up front. Moving from a desktop application to a web-based system will require a new implementation, as these two options are not currently found within the same software program. In addition, interview data also indicates a need to consider current or future software integration needs as part of the software selection process.

Figure 4.7: Hierarchical chart for software section



Source: Own compilation

In terms of “Part of ERP”, respondents indicated that in their experience, organisations attempt to implement the CRM modules that come as a standard addition to an ERP and fail to capitalise on the more appropriate “best in class” specialised CRM software.

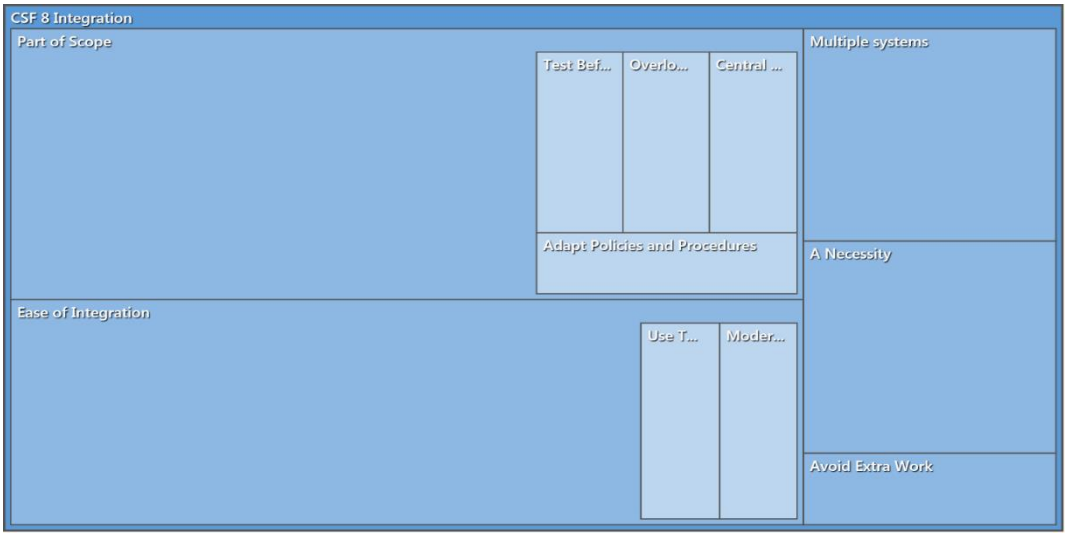
4.11 INTEGRATION

While respondents indicated that addressing issues around integration is a necessity, these issues should be addressed as part of the project scoping process (Part of

scope), as shown in Figure 4.8. Responses show that dealing with integration issues ahead of go-live allows end-users to see and use the full benefit of the programme and assists with employee acceptance. The interview data does, however, indicate that organisations can and do overlook integration requirements, resulting in a less efficient handling of the process. The data also indicates that technological advances continue to reduce the complexity surrounding integration, and as such organisations should not be averse to integrating with specialised CRM programmes.

One respondent did note however that integrations should not be from one database to another, but should rather be done via an application programming interface (API) to allow for future software upgrades.

Figure 4.8: Hierarchical chart for integration



Source: Own compilation

4.12 TRAINING

Training has already been identified as an important element of generating employee acceptance, but questions regarding training as a CSF were aimed at identifying actions that can be taken to ensure training is effective. In the experience of the respondents, there was an overriding need for training to be as practical as possible. The major theme identified was that of “Train with a purpose”, and this captures the essence of what most respondents indicated as being the most effective form of training. The literature suggests this approach is particularly effective when combined

with highly relevant or practical material and supplemented by regular reviews of material already covered (Brar & van der Meij, 2017:475-478).

The theme outline for training is shown in Figure 4.9. Standard classroom sessions are felt to be ineffective. According to the interview data, training should take place using the new system, with end-users performing their specific functions using organisational data to ensure the training is as practical as possible. This approach is best captured by the following:

> What works for me, like with any software, is if you can sit, even if it's a group setting, but people have their computers in front of them and they're actually completing tasks, and they're going through processes. Interview L (Tactical Level)

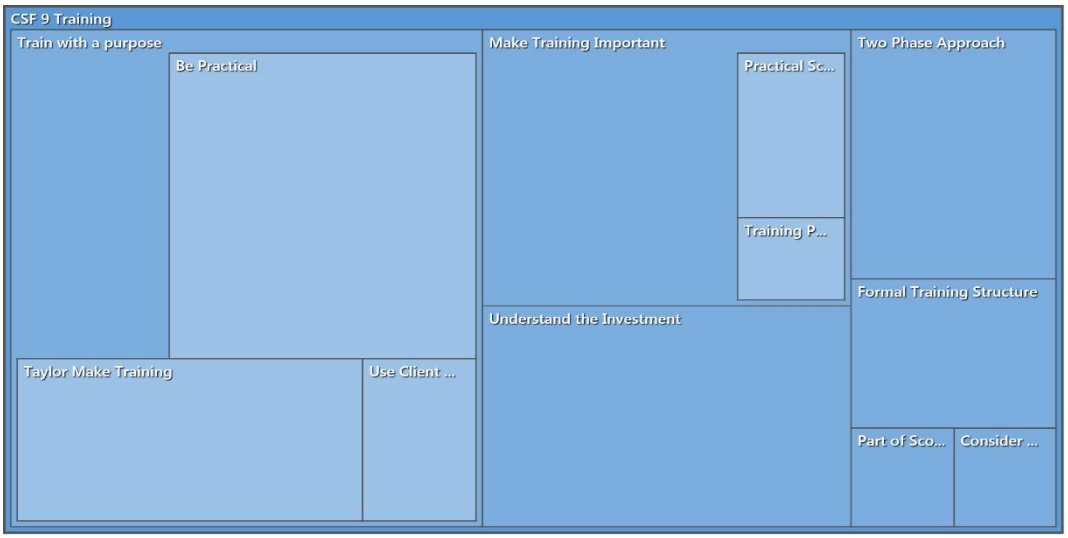
In addition to the practical orientation, respondents indicated that organisations often treat the training as of secondary importance (Make training important). However they feel this can be addressed through a combination of practical approaches. These may include ensuring that training is carried out during normal working hours to signal that the training is not an extra burden, but rather an important part of the process. They may also include simple actions such as ensuring all participants sign a register to confirm they have been trained and, possibly more importantly, that they have understood the training. Respondents also indicated the need for all new employees to undergo formal training, as opposed to being trained by co-workers, as this once again reduces the level of importance attributed to training.

Attributing importance to training might be best represented by the following quote:

> On CRM, you have got to keep at it. It has got to become a way of life. So, it has got to be the rule, not the exception. The training – that is why projects fail. Interview K (Management Level)

Two other important themes relating to the CSF of training were identified as "Understand the investment" and "Two-phase approach". The first theme is based on respondents indicating a further failure of organisations to understand the impact of reducing training costs. One respondent commented that should the training be viewed as too expensive, the organisation should consider a less costly software package to ensure training can be done as required.

Figure 4.9: Hierarchical chart for training



Source: Own compilation

Closely related to this first theme is the need to accept that training will be more effective if done in two phases. In particular, this two-phased approach should include what some respondents referred to as “hand-holding”. This refers to an organisation ensuring an implementation partner presence to assist end-users during the first few weeks of the live use of the new system. This view is best expressed by the following:

> The training, the phase two training is what most people don’t do and that is what they should be doing. Post-implementation training, not pre-implementation training and that is the reality.
>
> Interview K (Management Level)

4.13 REALISTIC IMPLEMENTATION SCHEDULE

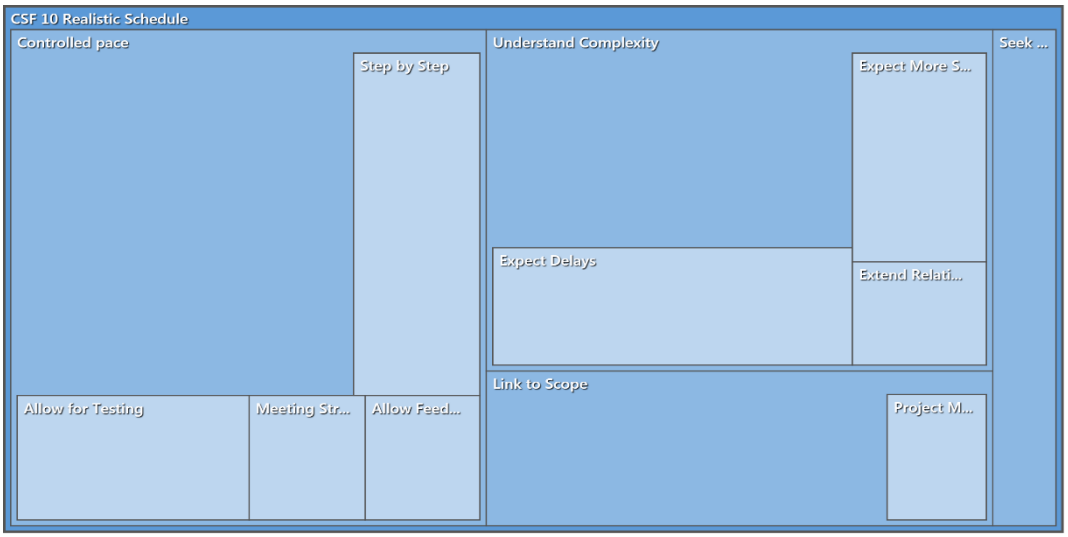
A realistic implementation schedule is the first of the five operational-level CSFs that were included in this study. Results from questions asked on this CSF indicate three primary areas of practical focus are required in order to contribute to a more successful project implementation. As shown in Figure 4.10, these include the themes of “Controlled pace”, “Understand complexity” and “Link to scope”. The last of these three themes (Link to scope) will be seen to be a common thread through most operational CSFs, where respondents felt that these factors do need to be considered in terms of their impact on the project scoping process.

Respondents indicated that organisations generally lack understanding of the need to adopt a more considered approach to developing the implementation schedule. To

this end, they were of the view that organisations would do well to accept from the outset that a slower and more controlled pace to the project implementation schedule is a necessity. Foss *et al.* (2008:72) agree with this noting that project risk increases with project size, but that this can be managed through a phased approach which brings in the use of the system in a logical flow.

In practical terms this implies accepting that the business must continue during the implementation period and as such, the natural fluctuations in weekly or monthly workloads needs to be considered to ensure relevant organisational personnel are able to commit in full during the times they are required for implementation tasks. Respondents also felt that wherever possible, the project should be implemented on a department-by-department basis, with the schedule allowing for periods of feedback and review to improve the implementation process as it proceeds to different end-users.

Figure 4.10: Hierarchical chart for realistic implementation schedule



Source: Own compilation

In terms of the theme “Understand complexity”, respondents indicated that organisations need to expect delays and in many cases, should expect some additional spending during the implementation phase. Based on their experiences, respondents were of the view that this type of approach allows an organisation to maintain its focus on achieving the broader objectives of a successful implementation. As a final comment, respondents indicated that “go-live” dates were seldom missed,

but as alluded to within the “Understand complexity” theme, the resources required to meet those deadlines are often underestimated.

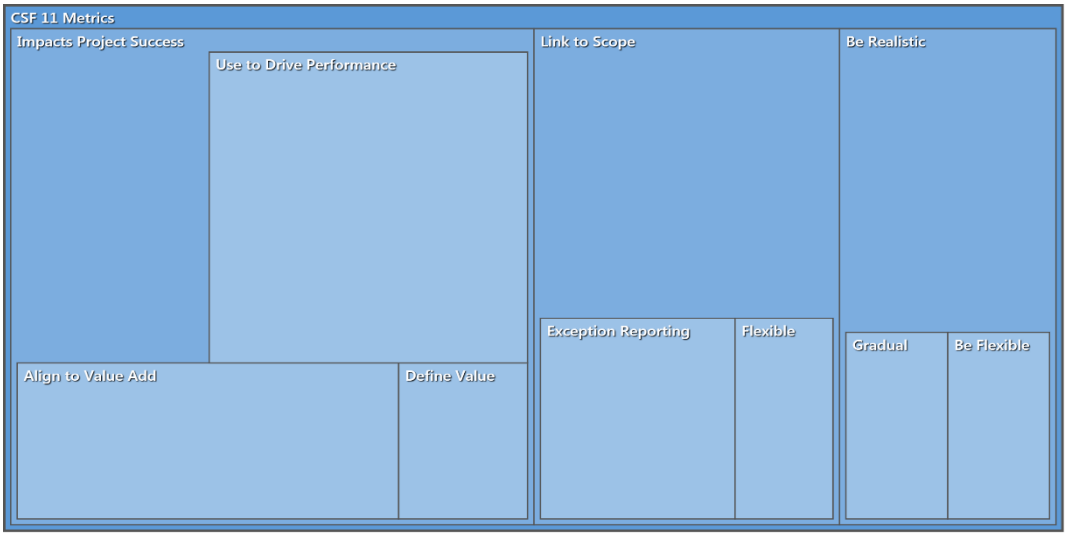
4.14 PERFORMANCE METRICS

The depth of interview data collected in response to questions regarding the CSF of metrics was relatively low. A number of respondents were not familiar with the concept of using metrics to improve CRM implementation success rates, and were therefore not able to relate useful experiences on the topic. However, where respondents had seen the use and benefit of using metrics, the mere awareness of the metrics that were required from the new system provided an indication of the likely success of the project.

> If you busy with a potential client and that’s the type of clients you going to sign you are thinking you can sign on this project then you know it’s going to be a success because the client knows what they want.
>
> Interview D (Tactical Level).

This quote captures the essence of the main theme “Impacts project success”, as per Figure 11. Within this theme, respondents also indicated the need to align metrics to areas of value-add within the organisation as well as to view metrics from the point of view of driving project, organisational and employee performance.

Figure 4.11: Hierarchical chart for performance metrics



Source: Own compilation

The “Link to scope” theme once again confirms the importance of considering operational CSFs within the process of creating the project scope, while the “Be realistic” theme reflects respondents’ views that some metrics will be difficult to measure from within the CRM system while others may only become apparent once the system is being used.

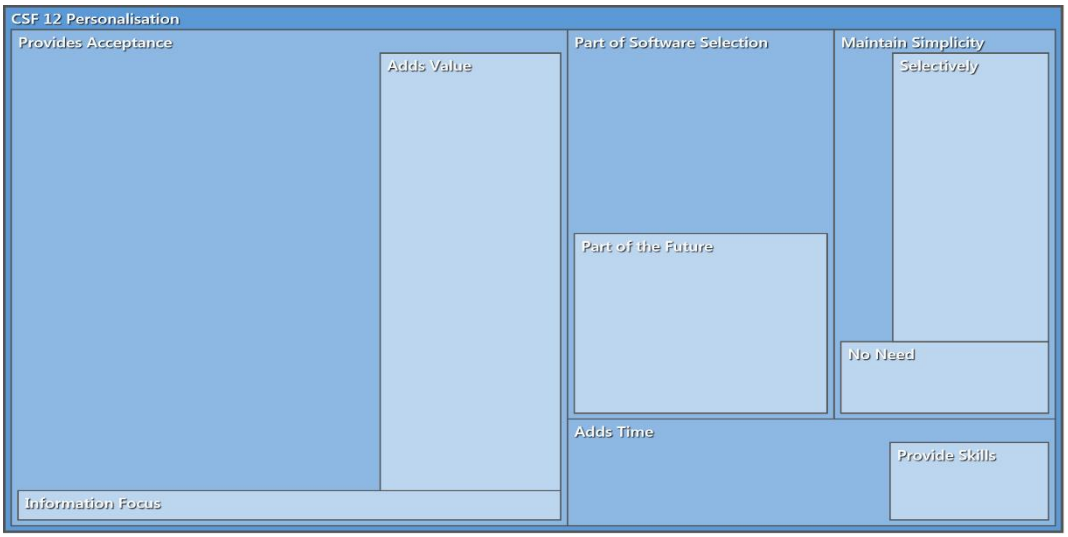
4.15 PERSONALISATION

Some respondents questioned the need for, or the value of, personalisation, but the overriding theme from those interviewed indicated that in their experience, personalising the system to organisational or individual needs enhances end-user acceptance (Provides acceptance). Personalisation was felt to take many forms, including the personalisation of end-user screens or reports. It may extend to the simple addition of a familiar feature, as indicated by the following:

> It helps people relate to, that if the CRM or if, let’s say for example, if it has my company logo there, it’s going to be easier for me to warm into it. Interview I (Operational Level)

In line with the interview responses, this CSF is strongly linked to the CSF of employee acceptance discussed in 4.6. This link highlights the importance of attending to this CSF, with respondents indicating that this can be addressed by including the capacity for personalisation as part of the software selection process (Part of software selection). They note that although personalisation will add some time to the implementation process (Adds time), the capacity to personalise the look of screens or reports is becoming a standard feature of many packages. The themes identified for personalisation are shown in Figure 4.12

Figure 4.12: Hierarchical chart for personalisation

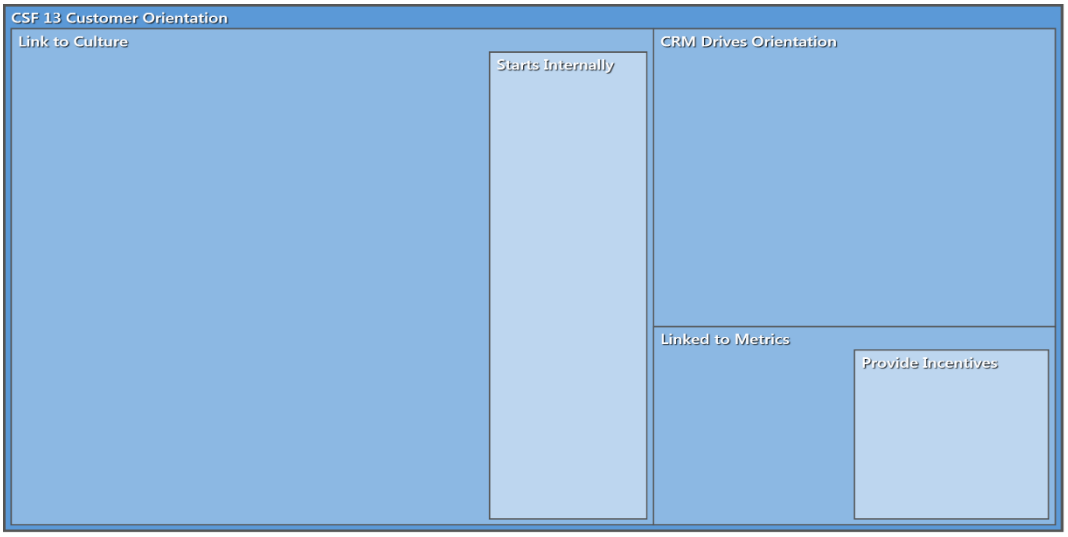


Source: Own compilation

4.16 CUSTOMER ORIENTATION

Interview responses from questions on how organisations can address the CSF of customer orientation at the operational level were analysed, but it is felt that the responses were not of a sufficient depth to warrant discussion, apart from noting that respondents who were able to share experiences considered this CSF to be highly dependent on organisational culture. No practical recommendations could be drawn from interview responses, but for purposes of consistency, the themes identified are shown in Figure 4.13

. **Figure 4.13: Hierarchical chart for customer orientation**



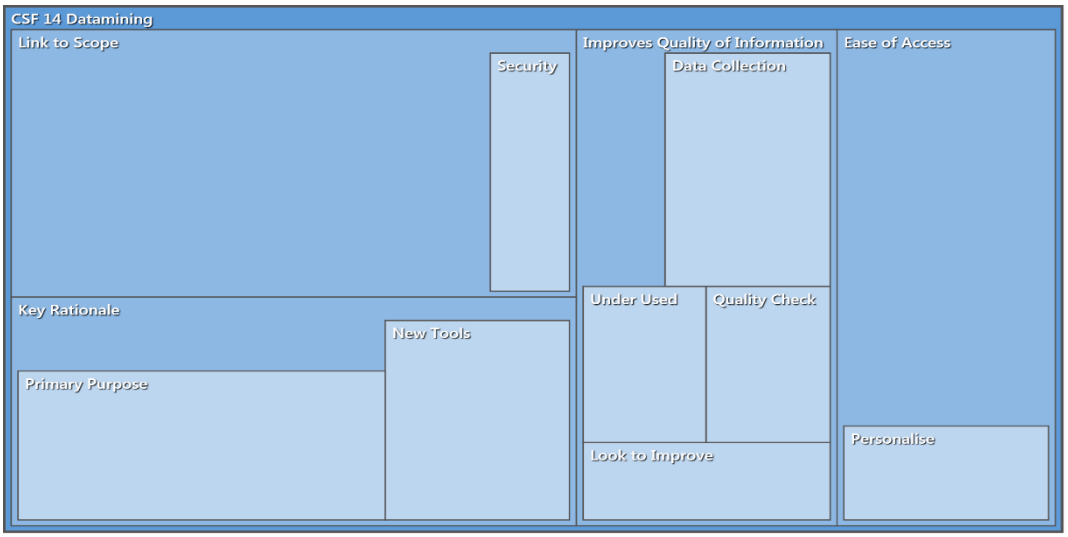
Source: Own compilation

4.17 DATA MINING

As the fifth and final operational CSF considered in this study, responses indicate data mining to be the most important of these operational CSFs. A number of respondents were of the view that the ability to access and analyse higher levels of data should be considered one of the underlying reasons for implementing a CRM system. Given the significance of data mining, there was strong support for the need to spend time at the beginning of the project to consider data mining issues as part of the scoping process (Link to scope). During this phase of the project, respondents indicated a need to address issues surrounding system configuration, to meet data mining requirements and identify additional data mining tools that may be required to meet these requirements. It was noted that while the possibility exists for data mining capabilities to be developed once the CRM system is operational, the more effective approach would be to attend to data mining requirements as part of the scope.

> I think that is probably the most critical factor of the CRM system. If you want to manage your customers properly and prospects properly, we have got to be able to get that information the way you need it.
>
> Interview B (Operational Level)

Figure 4.14: Hierarchical chart for data mining



Source: Own compilation

As shown in Figure 4.14, two other major themes identified were those of “Improves quality of information” and “Ease of access”. In the first of these two themes, respondents felt that attending to data mining as a CSF should be viewed in light of

providing the opportunity to improve the quality of information available within the organisation. This should however be matched by attention being given to the tactics employed for data collection. A simple but relevant example of this is provided by the following point:

> If you decide that you're going to give everyone a free shirt with their birthday, you need a birthday date and you need a shirt size, but is that the right information to collect when you've just added someone to the system? Interview L (Tactical Level)

Respondents also indicated a need for organisations to challenge themselves to seek new ways of using data from the new system, as in their experience there was a tendency for some organisations to restrict their data analysis to levels associated with systems in place prior to the CRM implementation. Project implementation partners should be encouraged to assist in this regard. Finally, the "Ease of access" theme is included merely as a reminder for organisations to consider how information will be presented and distributed throughout the organisation, so as to obtain the greatest benefit from the CRM implementation.

4.18 CHAPTER SUMMARY

In this chapter, the findings from the research were presented in the form of the major themes for each of the CSFs analysed. The results were discussed under each CSF with a focus on identifying challenges and associated solutions relevant to enhancing the impact each CSF might have on CRM implementation success.

CHAPTER 5

5. CONCLUSIONS AND RECOMMENDATIONS

5.1 INTRODUCTION

This research has presented the reader with a broad-ranging literature review covering the 14 CSFs identified by Eid (2007:2032) as being relevant to CRM implementations, as well as the empirical findings on how organisations might address each of these CSFs to improve the likelihood of a CRM implementation being a success. This chapter presents the conclusions as well as recommendations from these findings as a checklist of actions to consider when undertaking a CRM implementation.

A review of the research objectives is made and the limitations and management implications of the research are presented. Suggestions for further research are provided.

5.2 CONCLUSIONS

Conclusions are drawn from three different perspectives and are presented in this section. The three perspectives are: an overview of the major practical solutions to challenges identified by the research; secondly, the relationships identified between the 14 CSFs; and thirdly, the relative importance of each CSF. A model is presented to show the relationships between CSFs.

5.2.1 Practical solutions identified

The literature review confirms the importance of each of the CSFs to the implementation of a CRM project. Armed with this knowledge, the research has confirmed that a wide range of practical initiatives can be taken to make effective use of a CSF approach to CRM implementation. In particular, management is able to positively influence CRM project success by not only developing a clear CRM strategy and a clear project scope, but also by being visibly involved in the project and the use of the resulting CRM system. This approach shows support for the project but must be coupled with a clear articulation of the organisation’s stance on CRM, and in particular the fact that the CRM is a definite part of the organisation’s future. Top management

support was also seen as needing to translate the CRM strategy into something of practical relevance for each individual employee involved in the project implementation. Management also need to address challenges arising from the CRM project being seen as only relevant to certain parts of the organisation by emphasising its value to the organisation as a whole.

Spending more time on the preparatory stages of the project, ahead of software and IT architecture decisions, is likely to bring about a positive impact on a number of CSFs. These include employee acceptance, the development of a realistic implementation schedule, performance metrics, training and data mining. This approach also provides an organisation with the opportunity to formalise the project scoping process as well as sending out a clear message that CRM is important to the organisation.

The CRM project will ultimately require technical skill and knowledge surrounding software and IT architecture decisions. Where this skill or knowledge is not available within the organisation, the need to create a detailed project scope with clearly defined objectives across all aspects of the organisation becomes all the more important. The development of a project scope of real substance leaves the organisation in control of CSFs such as software selection, as vendors will need to provide clear proof of capability against set business objectives as opposed to focusing their efforts on convincing the organisation of the range of functionality on offer.

From a practical perspective, it was difficult to identify meaningful interventions for some CSFs. For example, the research indicates that little may be possible in the short term to correct deficiencies in organisational culture, but it is still important to note the reality of this culture at the start of the project and account for it in the project scope. Allowing additional training for older or less technologically orientated employees could be considered.

In addition to managing the realities of some CSFs, findings also indicated that the CSF of customer orientation might best be considered through the impact of the other more dominant CSFs such as top management support or developing a clear CRM strategy. Findings also showed that certain negative aspects of organisational culture,

such as a lack of willingness to be transparent, pose a challenge to employee acceptance, given the clash that will arise with the higher levels of transparency that naturally flow from a CRM implementation. Clearly articulating project outcomes and performance metrics well ahead of project implementation can address this challenge.

5.2.2 Relationships between CSFs

Findings from the research confirm a high level of inter-relatedness between the 14 CSFs analysed. The interactions between these 14 CSFs are shown in the model in Figure 5.1 and highlight the important role of top management support in influencing a clear project scope and employee acceptance, amongst other things.

The CSF of a clear project scope is in turn seen as playing a pivotal role in the project as a whole, but in particular as being an important precursor to software selection. The direction of the arrows in the model indicate the direction of influence as well as the order in which each CSF might be tackled, beginning the process with top management support. It can be seen that some interactions involve a two-way influence. For example, integration requirements will have an initial impact on software selection, but once this has been completed, all other factors considered, the software selected will impact on the integration process.

The high level of interaction between the CSFs highlights the need for every aspect of the project to be budgeted for in terms of resources. Attempting to save implementation costs by reducing spending in one area will not only impact on the specific CSF that is being under-resourced, but is likely to impact other areas of the project as well.

Figure 5.1: Model showing the relationships between and relative importance of the 14 Critical Success Factors

Source: Own compilation

5.2.3 Relative importance of Critical Success Factors

On the basis of identifying meaningful and practical initiatives through which to positively impact CRM project success, the four CSFs of top management support, a clear project scope, employee acceptance and software selection are seen as being

the most important of the CSFs analysed. These four are highlighted as such in Figure 5.1.

The research also indicates that the CSFs of training, a realistic implementation schedule, performance metrics, integration and data mining are found to be of secondary importance. This is based to a large extent on the level of influence these have on other CSFs, as well as the impact they might have in their own right. Finally, the remaining CSFs of benchmarking, a clear CRM strategy, organisational culture, customer orientation and personalisation are shown to be of tertiary importance, as assessed against the primary objective of the research.

5.3 RECOMMENDATIONS

Adopting a CSF approach to a CRM implementation will ensure that a broad range of issues are considered. While all CSFs may be considered as contributing to a successful implementation, organisational effort should be prioritised around those actions that are likely to have the greatest positive impact. With this in mind, a prioritised checklist has been developed to outline the recommended approach to addressing the challenges the research identified as being the most important when adopting a CSF approach. This checklist is shown in Table 5.1.

Table 5.1: A prioritised checklist for CRM implementation

PRIORITY	CRITICAL SUCCESS FACTOR	IMPLEMENTATION CHALLENGE	RECOMMENDATION
1	TOP MANAGEMENT SUPPORT	RESISTANCE TO CHANGE	Manage resistance to change by identifying and clearly articulating the benefits of the project while at the same time being clear that CRM will be a definite part of the organisation's future.
2	EMPLOYEE ACCEPTANCE	CHANGE MANAGEMENT	Involve end-users at the beginning of the process and focus on identifying the benefits and allaying employee fears at an individual end-user level.
3	TOP MANAGEMENT SUPPORT	MANAGEMENT INVOLVED	Management must find ways of showing a visible and direct involvement in project implementation and subsequent use of the CRM system.
4	CLEAR PROJECT SCOPE	FORMALISE SCOPE	Focus on identifying current and future business requirements in detail and do this well in advance of selecting the software. Identify CRM

PRIORITY	CRITICAL SUCCESS FACTOR	IMPLEMENTATION CHALLENGE	RECOMMENDATION
			performance metrics, integration and data mining requirements at this stage.
5	EMPLOYEE ACCEPTANCE	ESTABLISH EMPLOYEE FOCUS	Utilise the project scope to develop clear CRM objectives for each employee.
6	SOTWARE SELECTION	SOFTWARE TO FIT THE BUSINESS	Remain in control of software selection by taking the output from a thorough scoping process and aligning software capabilities to business needs.
7	TRAINING	MAKE TRAINING IMPORTANT	Formalise training during working hours and ensure it is structured in two phases, with a highly practical orientation.
8	REALISTIC IMPLEMENTATION SCHEDULE	CONTROLLED PACE	Agree on the resources and the budget needed to implement, but build more time into the implementation schedule.
9	ORGANISATIONAL CULTURE	LOW LEVEL OF INFLUENCE	Accept that culture cannot be changed in the short term, but utilise role clarity and performance metrics to overcome negative cultural influences.
10	TOP MANAGEMENT SUPPORT	CRM PROJECT CONTROL	Appoint a CRM champion/project leader with the authority to take action in all aspects of the CRM implementation.

Source: Own compilation

5.4 ACHIEVEMENT OF RESEARCH OBJECTIVES

The empirical findings of the research were used to determine if the primary and secondary research objectives were met. The results are discussed in this section.

5.4.1 Primary research objective

The primary research objective of this study was to identify the challenges that might be faced in addressing each of the 14 CSFs identified by Eid (2007:1031–1032) in the implementation of a CRM project.

This objective was achieved in that a range of challenges were identified against each of the 14 CSFs analysed. These challenges were described and discussed, with the relative importance of each challenge being presented diagrammatically.

5.4.2 Secondary research objectives

The achievement of the secondary research objectives is assessed as follows:

Secondary Objective 1: Identify the actions an organisation can take to meet the challenges identified in addressing each of the 14 CSFs.

Result: This objective was met in that a range of practical solutions was identified against the challenges identified. It is noted that some CSFs presented few challenges and therefore had fewer recommended solutions than others. Practical solutions were presented in Chapters four and five.

Secondary Objective 2: Identify relationships between the CSFs and how they might affect a CRM implementation.

Result: Findings identified a range of relationships between CSFs. These relationships were discussed in Chapters four and five, together with details of how they might affect a CRM implementation. A diagrammatic representation of these relationships is presented in Figure 5.1.

Secondary Objective 3: Confirm whether or not some CSFs are more relevant than others in influencing CRM implementation success.

Result: Three levels of the relative importance of different CSFs were confirmed: top management support, a clear project scope, employee acceptance and software selection were found to be the most important.

Secondary Objective 4: Prepare a priority-driven checklist of actions that an organisation should take in order to effectively apply a CSF approach to CRM implementations.

Result: A prioritised checklist of recommendations is presented in Table 5.1. The order of priority reflects, to a large extent,

the importance of the top four CSFs confirmed in secondary objective 3.

5.5 LIMITATIONS OF THE RESEARCH

The sample population was selected using a purposive sampling strategy and although it meets the criteria set for this strategy, the research was limited to exploring the experiences of the employees of a single organisation. Due to the limited time available for the research, there was no opportunity to carry out follow-up interviews to verify if actions suggested by participants to address internal implementation issues were in fact having the expected results.

While drawing on a wide range of experiences from CRM implementations in other organisations, the research participants had only recently introduced their own CRM system and as such a number of participants had limited experience of CRM as end-users.

Finally, the 14 CSFs included in this research were based on the results of a study in the banking sector in India. Limiting the research to these CSFs may have ignored other CSFs that may have been more appropriate.

5.6 MANAGERIAL IMPLICATIONS OF THIS RESEARCH

The research has shown that a CRM implementation can be affected by a wide range of issues that can be more readily identified and addressed by following a CSF approach. Following the CSF approach is likely to bring about a greater chance of CRM implementation success if all factors are considered. For CRM software implementation partners, the approach provides the framework for the development of an implementation methodology that can be honed over time.

For organisations that opt to implement CRM, the research provides practical guidelines for management and project champions to manage the implementation. In particular it provides management with a tool which will enable it to remain in control

of the process and enhance the chances of producing positive results by aligning project outcomes with the business requirements as a whole.

CRM continues to offer organisations the potential of a real competitive advantage, and despite a somewhat disappointing global track record, this research shows that a wide range of issues can be addressed by the adoption of simple and inexpensive actions. Where resources are limited, the research shows that efforts can be focused on the more important factors; the relationships identified between the CSFs provide for an understanding of the broader impact of under-resourcing certain parts of the project.

5.7 SUGGESTIONS FOR FUTURE RESEARCH

Qualitative research of a phenomenological methodology relies on generating data from the depth of experience and insights of participants and primarily from interviews. Future research should include a greater number of interviews with software implementation partners and organisational project champions to gain further insights into the potential for using the CSF approach, and to build on the checklist developed in this research.

Based on the development of an extended checklist, concurrent longitudinal research should be undertaken to test the effectiveness of the recommended actions across a number of different CRM implementations to confirm the applicability of this approach in a wide range of different industries.

5.8 CHAPTER SUMMARY

This chapter presented the reader with conclusions from the research and with recommendations based on a level of priority as determined from the research findings. The relationship between the CSFs and their relative importance to one another was indicated.

An evaluation of the research was presented and the limitations of the study and managerial implications were discussed. It was noted that both CRM implementation

partners and organisations that plan to implement or are implementing CRM systems can make use of this research.

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APPENDIX A

Data collection instrument

1. The following factors are considered critical to the strategic success of a CRM implementation:-
    a. Top Management Support,
    b. Organisational Culture,
    c. Developing a Clear CRM Strategy,
    d. A Clear Project Vision/Scope,
    e. Benchmarking

    2.1 Addressing each CSF, one at a time, how practical do you feel it is to address each of these factors in your company and what do you consider the main challenges?

    2.2 Based on your experience with CRM implementations in general have you noted any common initiatives that contributed to successfully addressing these factors and if so what are they?

    2.3 Have you noticed any common pitfalls related to addressing these factors and if so what are they?

    2.4 Without mentioning any company names are there specific examples you are able to provide to illustrate these observations?

    2.5 How would you practically apply these experiences to improve the chances of the success of your own company's CRM implementation?

3 The following factors are considered critical to the tactical success of a CRM implementation:-
    a. Employees acceptance
    b. CRM software selection.
    c. Integration with other systems.
    d. Training.

    3.1 Repeat questions as per 2.1 – 2.5

4 The following factors are considered critical to the operational success of a CRM implementation:-

    a. Realistic CRM implementation schedule.
    b. Clearly identified enterprise performance metrics for CRM.
    c. Personalisation of the CRM solution
    d. Customer orientation
    e. Data mining

    4.1 Repeat questions as per 2.1 – 2.5

APPENDIX B
Letter of Introduction and Informed Consent

NWU School of Business and Governance

Title of the study

The Practical Implications of a Critical Success Factor Approach to CRM Implementation.

Research conducted by:
Mr. M.G.Stevenson (28332318)
Cell: 082 419 2583
7 September, 2017.

Dear Participant

You are invited to participate in an academic research study conducted by Mike Stevenson, Masters student from the School of Business and Governance at the North- West University, Potchefstroom Campus.

The purpose of the study is to explore the practical issues surrounding the implementation of the CRM strategy within your organization. CRM implementations are known worldwide to provide companies with the potential for a strategic advantage over their competitors. The success rates of these implementations are not however considered high and a significant amount of research has been gathered to identify what might contribute to a successful implementation. Your own company has embarked on a CRM roll out. The approach will involve the addressing of 14 Critical Success Factors that appear to be applicable to most CRM implementations. These factors, are as follows:-

1. Strategic Factors, being a. Top Management Support, b. Organisational Culture, c. Developing a Clear CRM Strategy, d. A Clear Project Vision/Scope, e. Benchmarking
2. Tactical Factors, being a. Employees Acceptance, b. CRM software selection, c. Integration with other systems, d. Training
3. Operational factors, being a. A realistic implementation schedule, b. Enterprise performance metrics for CRM, c. Personalisation/relevance to individuals, d. Customer orientation, e. Data mining.

You are being invited to take part in a research study aimed at providing answers to the following question:- "What are the practical challenges in adopting each of the 14 Critical Success Factors outlined above in the implementation of a Customer Relationship Management strategy within your company? You will be able to draw on your personal experiences from implementation projects in other companies and relate this to how these challenges might be addressed in your own company."

Please note the following:

- This is an anonymous study survey as your name will not appear against any interview results. The answers you give will be treated as strictly confidential as you cannot be identified in person based on the answers you give.
- Your participation in this study is very important to us. You may, however, choose not to participate and you may also stop participating at any time without any negative consequences.
- Based on your willingness to participate in this study, you will be invited to participate in either a focus group interview or an in-depth interview with myself. I expect the focus group discussion to take no more than two hours while individual interviews should not take more than one hour. All interviews and the group discussion will be arranged at a time convenient to yourself and your company.
- The results of the study will be used for academic purposes only and may be published in an academic journal. We will provide you with a summary of our findings on request.
- Please contact my study leader, Dr Bertus Le Roux on phone number 0182994019 or email address Bertus.LeRoux@nwu.ac., if you have any questions or comments regarding the study.

Please indicate that:

- You have read and understand the information provided above.
- You give your consent to participate in the study on a voluntary basis. (Please tick) .

YES

Date of consent:_____

APPENDIX C

Governance
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12 May 2017

28332318

STEVENSON MG MR

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ETHICAL CLEARANCE

This letter serves to confirm that the research project of **STEVENSON MG** has undergone ethical review. The proposal was presented at a Faculty Research Meeting and accepted. The Faculty Research Meeting assigned the project number **EMSPBS16/06/03-01/42**. This acceptance deems the proposed research as being of minimal risk, granted that all requirements of anonymity, confidentiality and informed consent are met. This letter should form part or your dissertation manuscript submitted for examination purposes.

Yours sincerely

Prof CJ Botha

Manager: Research - NWU Potchefstroom Business School

Original details: Wilma Pretorius(12090298) C:\Documents and Settings\Administrator\My Documents\Briewe MBA\2017\