



# **CRM projects as a source of competitive advantage** **مشاريع إدارة علاقات العملاء كمصدر لكسب ميزة التنافسية**

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## DISSERTATION RELEASE FORM

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### Title

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## Abstract

Customer relationship management (CRM) appears to be gaining significant importance as businesses continually seek for efficient ways to manage their relationship with customers. In the light of this, this research had a core objective of ascertaining how CRM projects serve as a source for businesses to gain competitive advantage. In arriving at this core research objective, pertinent and preliminary research objectives had to be achieved. These research objectives focused on the reasons behind the success and failure of CRM projects. The researcher utilised interviews and questionnaires to gain primary data from respondents. A mixed method research was adopted in presenting and analysing data. The thematic analytical method was used to analyse the qualitative elements of the research while charts and the Pearson's correlation coefficient analysis, was used to establish a strong relationship between CRM projects and gaining competitive advantage. The project ended with proposing an area for further research, around customer centricity and CRM.

## ملخص

في الاونة الاخيرة بدأت أنظمة ادارة علاقات العملاء تأخذ إهتمام كبير بخاصة أن الشركات تسعى دائما الى ايجاد أفضل الطرق لادارة علاقاتها مع عملائها بطريقة فعّالة. وعلى ضوء ذلك، هذا البحث يقوم بدراسة مفصلة عن كيفية استخدام أنظمة ادارة علاقات العملاء كمصدر لكسب ميزة التنافسية في الشركات. وبهدف الوصول الى هذا الهدف الرئيسي للبحث، فقد كان من الضروري الوصول الى عدة أهداف أخرى ذات علاقة. هذه الاهداف ركزت على الاسباب المؤدية الى نجاح أو فشل مشاريع تطبيق إدارة علاقات العملاء في الشركات. حيث قد تم استخدام عدة وسائل بحث منها المقابلات الشخصية والاستبيانات الالكترونية للحصول على المعلومات الاساسية للبحث من المشاركين. واستخدام عدة طرق بحث لتحليل وعرض النتائج. وتحليل العناصر النوعية للبحث فقد تم استخدام المنهج التحليلي الموضوعي، وقد تم استخدام الرسوم البيانية ومعامل الارتباط بيرسون لايجاد قوة العلاقة بين مشاريع ادارة علاقات العملاء وكسب الميزة التنافسية. وبنهاية البحث تم طرح مجال آخر لمزيد من البحوث حول مركزية العميل وأنظمة إدارة علاقات العملاء.

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## **1.0 INTRODUCTION**

### **1.1 BACKGROUND OF RESEARCH**

Customer relationship management (CRM) systems are at the core of the architecture of telecommunication, financial and government organisations- due to their strategic function of maintaining customer relationships. Katz (2008) believes the importance of these applications but is concerned about the failure rates of its implementation within the telecom and other sectors. He believes that the growing complexities within the business has made the successful implementation of CRM projects very difficult- as its deployment, operation and adoption is attributed with so much risks. These systems installation in some cases involves a multimillion dollar investment within a complex business environment. According to Katz (2008) the failure of CRM projects within the telecom and other sectors could be defined in two perspectives: the outright cancellation or decommissioning of the project and secondly, it could be that of a subtle failure, which involves a scenario where the project is successfully implemented but after sustaining a massive financial and project schedule overrun.

Amidst the abovementioned challenges, Reichheld and Schefter (2000) indicated the importance of CRM systems- in increasing customer retention rate of 5%, which further impacts on a 25% to 95% increase in business profits. They further added that, customer retention is important to increasing profits. The article also stressed the point that, the main reason for customer departure to the competition is due to poor service. Mohammed (2013), states that CRM goes beyond the parameters of improving customer service- as it encompasses all activities geared at improving revenue. He further highlighted the transition from a more complex and expensive platform known as Enterprise resource planning solutions (ERP), which were mainly about the bottom line- limited in functionality and scope- leading to unfulfilled business objectives. He believes the limitations of the ERP system has led to the emergence of CRM platforms- enabling the ease and speed of data flow within an organization- mostly the entire organization. To this end, Kumar and Reinartz (2005) believe that adopting and implementing the right CRM platform could lead to higher sales, happier customers and a much enhanced bottom-line. Mohammed (2013) finally attested to the positive impact of CRM platforms, as corporation's report of increased profits due to successful CRM implementation, within a range of about 25% to 95%. These improved results

are as a result of less wasted time, better organized schedules and effective data flows from every division of the company.

Why the positive effect of a successful implementation of CRM projects might sound golden, Myron (2013) captured the thoughts of Gartner, which stated that more than 60% of companies that have implemented CRM did not have an agreed upon aspirations or goals for the project prior to the installation. This has somewhat led to the failure or collapse of some CRM projects as a study carried out by Merkle (2013), indicated a high failure rate of 63%- with 53% of this failure attributed to the organizations failure to own the customer insight. It is to this regard, that this dissertation seeks to discover the reasons as to why CRM projects fail. Secondly, how the findings could be helpful to enable companies within the telecom, financial and government sector, successfully implement CRM projects to gain competitive advantage.

## **1.2 AIMS AND OBJECTIVES**

The core aim of this project is to investigate the factors that are responsible for the failures in CRM project implementation. With primary focus on companies within the financial, government and telecom sectors. These findings will be great in helping to forward recommendations that would be instrumental in assisting with the successful implementation of CRM projects to gain competitive advantage.

The research aims and objectives are as follows:

- To evaluate the essence of CRM for businesses within the government, Telecom and financial sectors
- To discover the reasons behind the high failure rates of CRM projects
- To ascertain the factors that are responsible for successful CRM completion
- To analyse how successfully completed CRM projects could serve as a source of competitive advantage.

## **1.3 IDENTIFICATION OF THE PROBLEM**

Light (2001) argued that, there is little or limited academic work focused on CRM systems- as much of the published works are found in business papers, magazines and on websites. Reid and Caterall (2005) also added that there are not sufficient literatures expressing the role of data quality issues in hampering the successful

completion of CRM projects. It is in line with the high failure rates of about 63% of CRM projects, highlighted by Merkle (2013) and the limited academic literature on this topic, that this research is geared towards discovering the factors that affect the successful implementation of CRM projects. This has therefore led to the formulated research questions below:

#### **1.4 RESEARCH QUESTIONS**

- 1) What role do CRM applications play in organizations?
- 2) What are the causes of CRM failures?
- 3) What are the factors that are responsible for the successful implementation of CRM projects?
- 4) How can a successfully completed CRM project serve as a source of competitive advantage for companies within the telecom, government and financial sectors?

#### **1.5 SIGNIFICANCE OF STUDY**

The findings generated from this research would be helpful in having a clearer picture and understanding as to the factors that hamper a successful CRM implementation, how these could be better managed and overcome- and then serve as a source for competitive advantage. This work would be significant not just to companies within the government, finance and telecom sectors but firms using or considering the adoption of any form of customer relationship platform

#### **1.6 RESEARCH OUTLAY**

This research is divided into five chapters, with the first being the introductory chapter, which embodies the research background, aims and objectives, research problem and the research questions and the significance of study. The second chapter reveals the related literature on the germane concepts of CRM, ERP, Management strategy, competitive advantage and theoretical frameworks relevant to this investigation. The third chapter is focused on Research design and Methodology- as the nature of the investigation is highlighted. In addition, this chapter indicates the data collection method, sampling techniques, reliability, validity and possible limitations of this

research. The fourth chapter expresses the presentation and analysis of data. In addition, it would show how the collected data addresses the research questions and realises the objectives. Chapter five presents the conclusion and recommendations.

## **2.0 LITERATURE REVIEW**

The presentation of related literature is an important section of any given research, as this could be conceived as the recognition and evaluation of contributions made by others within a given discipline (Collis and Hussey, 1997). It is also defined as an acknowledgement of contemporary thinking in a field (Creswell, 2014) whilst Bryman (2012) believes it is an integral and germane review of related studies in order to prevent 'reinventing the wheel.' This chapter incisively presents further explanation and definitions of the pivotal concepts behind this research. It also presents different arguments and perspectives in relation to the concept of CRM, its enabling and inhibiting factors, to gaining competitive advantage.

### **2.1 ORIGIN AND EVOLUTION OF CRM**

Xu et, al (2002) conducted an extensive research which addressed how CRM has evolved over time. They believe the first breed of CRM solutions came in the late 1980's and early 1990's- and the providers of this inaugural products are known as Clarify, now owned by a firm called Nortel Networks Corp. Other pioneering CRM solutions are Onyx Software, Vantive and Siebel systems. While Xu et, al (2002) looked at the evolution and origin of CRM from a systems and platform perspective, Payne (2012) delved more into its concept and principles. He argued that the term CRM came into use in the 1990's but the principles on which it has been premised upon, has existed for a longer time. Payne (2012) further added that CRM did not emerge in isolation but progressed through the tenets and framework of relationship marketing. He thus, views CRM as information-enabled relationship marketing. The transformation of CRM from the late 90's to date, have been largely influenced by factors such as the wielding influence of computers, increased storage capacity of computers, rise of e-commerce and sophisticated data mining tools.

**Table 1: The history of CRM (Source: Xu et, al (2002)).**

<b>Age</b>	<b>Year</b>	<b>Lesson learned</b>	<b>Milestones</b>
Introduction	1980's to early	Very expensive to maintain	Focusing on automating And standardizing the internal Processes to make the customer and asset.
Growing	Mid-1990 to end 1990	Some vendors are slow to respond to the internet	Due to the emergence of the web, client/server architecture behind CRM applications would disappear.
Current	2000	N/A	E-CRM
Future	After 2000	N/A	N/A

With a good understanding on the emergence of CRM, it would now be imperative to incisively look into its definition from different authorities.

## **2.2 WHAT IS CRM?**

Greenberg (2009) believes the concept of CRM has been poorly defined over the years and misconceived by many company executives. This sentiment is shared by Buttle and Maklan (2008) who also argue that there seems to be a confusion regarding its meaning and Cooper (2001) highlights the presence of heightened academic debates on the meaning of CRM. In the light of all this, Greenberg came up with a working and tenable definition:

“CRM is a philosophy and a business strategy supported by a system and a technology designed to improve human interactions in a business environment.” (Greenberg: 2009:30)

In adding a bit of more clarity, to this definition, Greenberg (2009) believes CRM is more operational and transactional approach to customer management, that was centred on the customer-facing departments- marketing, customer service and sales.

Dyche (2001) believes that the definition of CRM has emerged as companies are seeking ways to identify valuable customers and maximizing their patronage. It is based on this need that she defined CRM as the framework that enables the expression and increase in customer value, and the appropriate way to motivate profitable customers to remain faithful or buy again. Kostojohn et, al (2011) brought an interesting and two dimensional element to the definition of CRM. They believed the business landscape is becoming more competitive as companies seek for new ways to gain competitive advantage. This makes it worse as the customer becomes more sophisticated, more demanding and less loyal. To them, this sparked the emergence and definition of CRM, which is two dimensional in nature. On the first hand, they argued that 'CRM is a program' that embodies the people, process and technology that a business employs to improve her customer focus. On a second perspective, Kostojohn et, al (2011) are convinced that 'CRM is an application' that depicts its technological attributes that comes in the form of software packages. Putting this in a more concise way, they view the strategy aspect of CRM as a 'Program' and the technological genre as 'Application.' Kumar and Reinartz (2012) share the same thought on CRM with Kostjohn et, al(2011). They define it from a customer value perspective, which goes thus:

CRM is the process of analysing and using marketing databases and leveraging communication technologies to determine corporate practices and methods that maximize the lifetime value of each customer to the firm (Kumar and Reinartz:2012:4)

On the contrary, authors like Peppers and Roger (1995, in Varey 2012) argue that IT is the most important aspects of CRM, as they define CRM from a purely technological perspective to mean a market place for technology-laden and software driven changes. Kotler and Keller (2011) debunk and disagree with the thoughts of peppers and Roger, which focuses purely on the IT element of CRM. They share the sentiments of most researchers that conceive of CRM as a strategy- which informed them to define it, as a process of meticulously monitoring and executing detailed information about individual customers and all touch points, with a bid to ensuring loyalty. Finally Xu et, al (2002) couldn't have put up a more comprehensive and concise definition of CRM as an ell-encompassing strategy, which easily integrates sales, customer service, marketing and field service. With a good working definition and understanding

of the cardinal concept of CRM, for the good of this research, it would be imperative to look at the different types of CRM.

## 2.3 TYPES OF CRM

Dyche (2001) and Greenberg (2004) have contributed a lot to the different types of CRM that exists in the contemporary business environment. Metz (2011) and Jamieson (2014) have also shed a great deal of light to these different forms of CRM that exist. They are:

- 1) **eCRM**: According to Dyche (2001), this stands for electronic customer relationship management, which focuses on a web-based form of CRM. Zingale and Amdt (2001) also expressed electronic CRM to embody all CRM functions that are premised on the net landscape- internet, intranet and extranet. They also opine it to be the full spectrum of a company's relationship with the customer that utilises information technology.
- 2) **ECRM**: This is a different type of CRM which stands for enterprise customer relationship, as expressed by Dyche (2001). She says it focuses on CRM that spreads on an enterprise-wide perspective of a customer.
- 3) **CMR**: Greenberg (2004) highlighted this as a new type of CRM, which involves acronym change- to mean customer managed relationships. According to him, it was first introduced by Disney destinations, the travel arm and vacation division of Disney. He perceives this as a sign that the customer manages its relationship with a company.
- 4) **VRM**: Easton and Easton (2014) belief of vendor relationship management as that of managing the relationships with suppliers, while Gut (2007) enthuses that VRM highlights the independence of the customer and her ability to determine relationships with vendors. Greenberg (2004) believes VRM is an emerging form of CRM that involves the creation of tools that aid individuals to relate with vendors- a reciprocal of CRM.
- 5) **PRM**: Dyche(2001) views partners relationship management as the ability of a vendor to adequately manage their partners through the injection of dependable systems and better processes for engaging with them.
- 6) **Social CRM**: Greenberg (2004) is a leading contributor to this new type of CRM, which he believes is triggered by the needs for a social customer. He



defined social CRM as a philosophy and business plan of action, aided by a technology medium, processes, business and social characteristics- mapped out to interact with the customer in a collaborative manner. Metz (2001) and Kruger (2013) also share in this thought as they view it as an engagement with the customer in a mutually beneficial manner, of which Jamieson (2014) believes the customer becomes the centre of interaction and Lacy and Diamond (2013) concur to this.

Regardless of the above-mentioned types of CRM, Dyche (2001) argue that the company's interaction with the customer is the denominator and maximizing a profitable relationship is imperative.

## **2.4 SPAN OF CRM FUNCTIONALITIES IN BUSINESS/FEATURES/BENEFITS OF CRM**

Balba and Garan (2013) are convinced that CRM as a strategy powered by technology is useful in synchronising business activities in marketing, sales and customer services. These are believed to be the three core business areas where CRM capabilities are experienced the most (Greenberg 2009). Contrarily, XU et, al (2002) argue that there is a fourth core area in business where CRM is influential, i.e., field service. We would now briefly look into CRM in relation to these four business areas- Marketing, customer service, sales and field service.

### **2.4.1 CRM in Marketing**

Dyche (2001) conceives of the great impact CRM plays on marketing or a great arsenal in the marketer's armoury. CRM provides a great database that helps marketers execute successful marketing campaigns. Rust and Verhoef (2005) argue that CRM in some cases encounters the problems of homogenous marketing- where the design of the marketing mix for customers is uniform- failing to incorporate individual preferences and differences. They further argue that before the inception of automated CRM, traditional direct marketing techniques have been able to recognise individual preferences and determining which individuals were targeted for a catalogue or direct mailing. On the contrary, Brash and Millhouse (2000) believe CRM, not off – the-shelf ones, but process workflows, provides web content management software, which provides personalisation of service to the customer.

This notwithstanding, Rust and Verhoef (2005) conception of the shortcomings of a homogenous CRM approach in marketing led to empirically testing whether a personalised CRM approach performs better than a traditional segmentation initiative. This study led to the proposition of a new model called: 'The managerial problem.' This model is geared at promoting a personalised CRM marketing philosophy that is entrenched on the profitability level of each customer over a intermediate-term or period of time. The logic behind this model is that, a heterogeneous or personalised CRM marketing approach helps to determine the profitability levels of each customer and what distinct and individual marketing techniques drive or drain the profitability of each customer.

It helps to understand where a business needs to concentrate its effort more and where not to. This sentiment is also shared by Park and Kim (2003) who believe committed customers are profitable to the organisation over a longer period of time. Customer commitment does not happen by accident (Roberts-Lombard and du Plessis, 2011), it is a product of meeting and satisfying the customer expectation (Keshvari, 2012). In order for a company to effectively manage her relationship with the customer, there is the need to utilise a CRM platform that supports diverse customer data, like: of-the-customer, for-the-customer and by-the-customer information. The cardinal point here is to have a CRM strategy in place that provides database, decision framework and communication network for effective relationship management (Han-Yuh, 2007). CRM in marketing in this scenario helps marketers to be equipped with customer information (Sarin, 2012), that in turn facilitates a win-win relationship, between the company and the customer.

#### **2.4.2 CRM in Customer Service**

Xu et, al (2002) argue that due to a saturated and competitive business environment or market place, companies are now looking beyond a product-cantered stage to a more customer-focused proposition. Customers seem to be demanding for a more improved and responsive relationship with businesses (Nejiatian et al, 2012). They also argue that with current CRM technologies, businesses are assisted to acquire

enough information about the customer- what they bought, when they bought, what challenges they've had and predictions premised on their historical behaviour.

At this current business age, the ability to understand and effectively manage the customer relationship is pivotal to achieving the business goals (Goodman 2014). CRM is very instrumental in delivering customer-centric relationships (Greenberg, 2010). Great companies are focused on effectively using CRM to understand the customers' needs, concerns and challenges- devising a plan to address these customer worries, in a bid to delivering a better customer experience (Blanchard, Halsey and Cuff, 2014). The tripartite aim of CRM is to improve a company's ability to comprehend the customers' current needs, what they have done in the past and what they aim to do in the future. Rababah et al (2011) therefore added that understanding the customer simply helps deliver a top-notch customer service and experience.

### **2.4.3 CRM in Sales**

A great feature of CRM is sales force automation or how CRM is useful in the sales process- in upselling and cross-selling to customers (Kaushik and Kundan, 2009). Also, Xu et, al (2002) believes the first characteristics of CRM is in enabling and facilitating the sales process by providing a system and a database that expresses current customer, competitor offering and product deals- all in a central system. This empowers the sales agents with the appropriate information to provide customers with the best possible deals (Ling and Yen, 2001). In a more detailed manner, CRM provides an integrated order placement and tracking system, which helps the effective monitoring of the customer's sales cycle. A concise view of each customer does comprise of all contact information and sales history (Almunuwari and Anshari, 2011). In summary, CRM is instrumental to sales (Xu and Walton 2005) due to its ability tap into product, promotion and discount data, with the help of email and internet- to convert that prospect or lead to an actual sale.

### **2.4.4 CRM in Field Service**

Xu et, al (2002) are convinced that this is a characteristics and business element of CRM. This implies that with a CRM platform, remote staff can quickly and adequately communicate with customer service agents to satisfy individual customer

expectations. In a more practical sense, customer requests are entered in, allocated, supervised and tracked to maintain a high quality of customer service. Well trained engineers that are also available are then promptly assigned to deal with each case (Bull and Adam, 2010). Peppers and Rogers (2011) and Spector (2012) believe on the essence of CRM and its role in field service. On the contrary, they integrate field service into customer service. This then leaves the three main core business elements of CRM- marketing, customer service and sales.

## **2.5 IT COMPONENTS OF CRM**

At the earlier section, the business elements and characteristics of CRM was looked into, with an aim of understanding how the spread of CRM functionalities is in business. CRM stresses the adoption of customer information to enhance revenue- with an improvement on front office functions: sales, marketing and customer service (Aciobanitel, 2013). According to Payne (2012) this is made a reality with a functional IT infrastructure. To this end, he expressed two types of IT components that enable a CRM platform to maximize customer information.

### **2.5.1 Data repository**

Payne (2012) Identified this as the first type of IT component in CRM, as it helps the organization to gather a whole set of information on customers, using a set of analytical tools that helps in establishing a better understanding of the customer's past and most likely, future behaviour.

### **2.5.2 Application**

This is the second IT component identified by Payne (2012) and comprise of systems that facilitates value-laden customer interactions, across multiple channels. Systems like clever screen prompts, are examples of the application element of CRM (Chen 2012). These prompts will help customer service agents of a customer's profile and the unique techniques that could be adopted to increase up-selling and cross-selling.

## 2.5.3 Planning your CRM Program

In planning for a CRM program, several elements are considered to be important, as they could be considered a pre-requisite- Payne (2012) considered this to be the development of strategy.

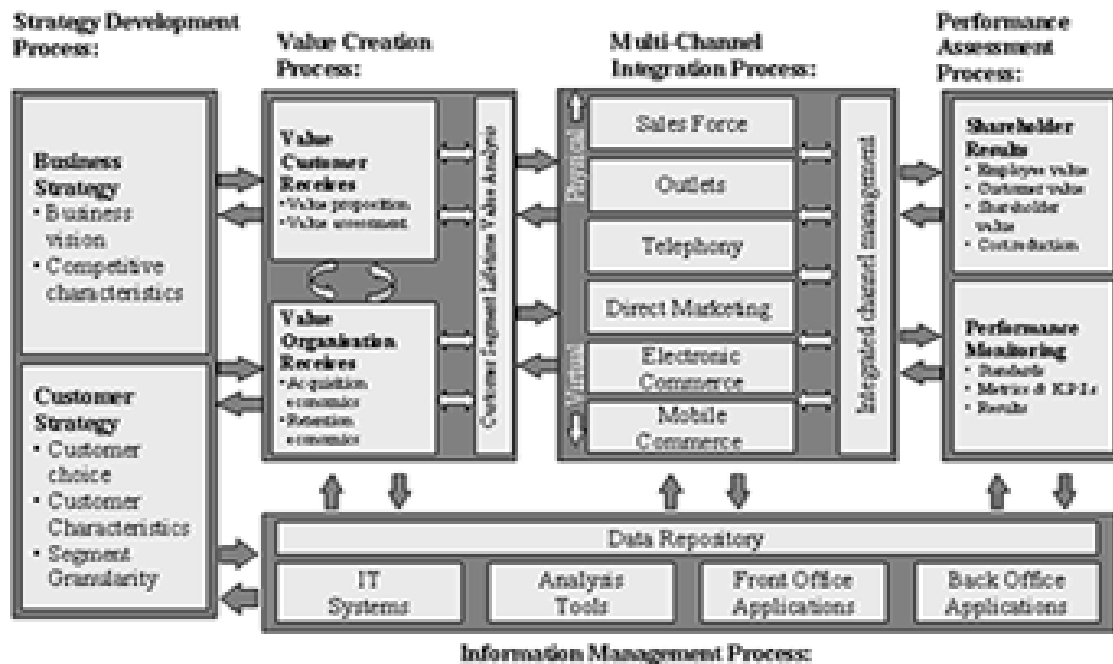


Figure 1: The Strategic Framework for CRM (Source: Payne (2012)).

Developing a core strategy seems to be fundamental before the consideration and implementation of a CRM project (Lassar et al, 2008). Based on the above diagram, it is pertinent to note that before a company embarks upon a CRM initiative, it is imperative they design strategy from the business and customer perspectives. This section would briefly look into the essentials in planning before the chronological stages of CRM implementation would be delved into.

Firstly, from the business aspect, recapturing and emphasizing on the company's business vision is instrumental to its strategy. Payne (2012) went further to state that the process of enacting a firm's business strategy should begin from its vision (Mukerjee, 2009). The business vision should be a true image of the of the company's values and aspirations (Curry 2004). The vision should also aim to provide the best work environment. With a clear vision (Piskar, and Fanganel, 2009), top executives

could re-evaluate the organizations business strategy that seeks to coordinate all divisions for the actualisation of the corporate goal (Roberts et al, 2005). The important point to note here is that the CRM project is not expected to define a firm's business strategy but to tailor the CRM product to complement the business vision.

Secondly, building a customer strategy is an important element to starting up a CRM project. Defining the goals of a business towards her customers is essential. Understanding where this customer comes from, their needs and their expectations (Gurau et al, 2003) are great components of a customer strategy that is inculcated into the CRM program manifesto.

After having a clear understanding on the origin, meaning and features of CRM, planning of a CRM program, it would now be important to look deeply into the chronological stages of CRM program implementation, as stated by different scholars.

## **2.6 IMPLEMENTATION OF CRM**

Several authors have approached the concept of implementing CRM from varying perspectives (Kevork et al, 2009). This section would therefore capture different key elements that make up the implementation of a CRM program, as expressed by varying authorities. Buttle (2009) has carried out an extensive and chronological CRM implementation process which would be the first to be looked into in line with other researches.

### **2.6.1 Five phases of CRM implementation**

Buttle (2009) came up with the five phases in the CRM implementation process. These phases are found below:

**2.6.1.1 Develop the CRM strategy (Phase 1):** Developing CRM strategy as defined by Buttle (2009:65) "CRM strategy is a high-level plan of action that aligns people, processes and technology, to achieve customer-related goals." The subsets under this first phase would be now be looked into.

**2.6.1.1.1 Situation Analysis:** This appears to be the first step in the CRM and implementation process (Buttle, 2009) as it involves the evaluation of the company's current CRM state with addressing questions like: 'Why are we

where we are?’ This analysis addresses three key elements. Firstly, situation analysis helps a company address her **customers** and their respective **segments** (Lindgreen, 2004). It looks into issues pertaining to customer touch points (Sinha and Iyer, 2013) and their experience of doing business with a company. Other important issues looked at also includes market share and expenditure on customer experience. The second constituent under situation analysis, looks at market deliverables (Chikweche and Stuart, 2013), which comprises of products been offered and the brand’s approach. Variables like that of prices and how it compares with the competition is also essential.

Finally, the **channels** or medium through which customers are distributed and catered for is also an important element. Understanding the most effective channel, online, retail or telephone is very important in evaluating the CRM needs and priorities of a company. The ultimate objective is to have a vivid picture into the deficiencies and strengths of a company’s customer strategy.

**2.6.1.1.2 Embarking on CRM education:** CRM is a concept that has attracted a wide array and varying meanings, which tends to be confusing to so many. Buttle (2009) advocates for all stakeholders to have a clear understanding of what CRM means before it is embarked upon. Without a proper education and understanding (Bavarsad et al, 2013) the IT department may assume that CRM is purely a technology project, which is their prerogative, of which Molan et al, (2003) disagrees with, as they believe it is more than an IT project. Sales department may assume it a system that presents a central database that helps hold together customer records (Zahay et al, 2012) that could be used during the sales cycle (Rodriguez et al, 2014). For the marketing department, CRM may seem like a new mechanism that helps for a better marketing campaign (Crosby and Johnson 2001) and campaign management (Hillebrand et al, 2015). While the customer service agents would view CRM as a better way to handling customer complaints (McNally 2007) and tracking cases (Rogers et al, 2008). These are all genuine expectations and capabilities of CRM but they present a fragmented perspective hence, the need for an organisation to enrol her key departmental officials to undergo a training program for a more comprehensive understanding of CRM (Cooper et al, 2005). Shu-Mei and Pin-

Hong (2014) also argue that a collective training programme helps the sharing of knowledge between departments.

**2.6.1.1.3 Formulating the CRM vision:** CRM vision is an important element of the Implementation process as it relates to a statement of intent on how CRM would improve the current state of a business (Dashan and Subrat, 2008) and the need to have a set goal, that would propel the entire organization (Khalid et al, 2011). Other researchers like Sami and Ibrahim (2011) are convinced beyond doubt that the CRM vision is the ultimate guide to the actual implementation.

**2.6.1.1.4 Set priorities:** Having priorities set right is an important aspect of the implementation process (Bohling et al, 2006) and the balance score card (Mohammad et al, 2011), as every core department- sales, marketing and service are aligned to CRM projects that are of high importance- with quick returns, accelerated wins at reduced cost (Buttle 2009). Puente and Cervilla also added to this as they opined that the implementation of CRM projects should be in line with the organization priorities.

**2.6.1.1.5 Set out goals and objectives:** Goals and objectives are very important elements to the implementation of CRM projects (Sarmoniotis, et al, 2013) and Sudhir (2004) believe if this is not set clearly, failure is inevitable. Khalid et al (2011) are convinced that having a clearly defined goal is a pre-requisite and Buttle (2009) agrees that they are an offshoot of a crystal vision and well set priorities.

**2.6.1.1.6 Identifying people, process and technology demands:** Chen et al (2003) believe that CRM requires the combination of people, process and technology to understand the company's customers. To this effect Parida and Baksi (2013) advocated for the identification and integration of the key people, required process and appropriate technology to make this work. A more sales oriented process, would require the appropriate sales personnel's and a sales-force automated technology (Butter, 2009).

**2.6.1.1.7 Designing and developing the business case:** Doyle (2007) argues that so many projects do not come to fruition because the project



advocates and sponsors fail to understand the pivotal role of a concrete business case. His experience with the deployment of an analytical CRM project for a US telecommunication company, made him point to the critical role of having a strong business case that becomes a strategic tool to the project development cycle and onward project delivery. Buttle (2009) went ahead to stress the important role a business case or the justification for a project plays. He is convinced that a good business case should portray the cost and revenue of a proposed project; highlighting its essence and benefits.

**2.6.1.2 Build CRM project foundations (Phase 2):** This phase comprises the cornerstone of CRM implementation. Buttle (2009) points out essential elements to be considered. The first of these that would be looked into is the identification of stakeholders.

**2.6.1.2.1 Identify stakeholders:** Bohling et al, (2006) believe the Identification of key stakeholders are instrumental to the successful implementation of CRM programs, as these stakeholders could consists of employees, shareholders customers and vendors. Mukerjee and Singh (2009) also added that it should not only be the identification but also the alignment and appropriation of each stakeholder's capability.

**2.6.1.2.2 Governance structures:** Piskar and Fanganel (2009) believe that CRM projects require governance structures that guarantee that roles and responsibilities are adequately defined and adhered too. Bygstad (2003) argues that CRM projects are very complex hence, the need for a governance structure that defines the roles and responsibilities of the project management team and the project director.

**2.6.1.2.3 Identifying Change management requirements:** Introducing a new CRM project brings about change to the way an organization is used to doing things. Desai and Sahu (2008) believe that understanding change management requirements is crucial to the successful implementation of a given CRM project. Buttle (2009) also added that leadership play a crucial role in identifying

the change management needs of an organisation and also driving change. He looked at change from a top-down leadership and bottom-up buy-in.

**2.6.1.2.4 Organizational culture:** Sudhir (2003) believes if CRM has any chance of succeeding it needs to be aligned and embedded into the corporate culture of the organization. Chung et al (2012) believes the way people think, act and overall behaviour in the organization forms the corporate culture. They also believe a more flexible, enterprising and resource oriented behaviour within the work force, would facilitate CRM success, as people would be more prone to adjusting to the changes and complain less.

**2.6.1.2.5 Identify important success factors:** Buttle (2009) believes the CRM critical success factors are the 'must haves' that are instrumental to an excellent implementation. To this end he added these as possible CRM success factors: availability of useful and timely customer information, crystal focus on people and process challenges, organisation culture that is adaptable and with manageable milestones. Lawson-body et al, (2011) argue that CRM success is highly determined by social rather than technical factors. They believe that the context and environment in which a company exists and how it relates and reacts to this environment is critical. They also looked at the data quality issues and how an organization handles this as an important success or failure factor while Moghadam et al, (2013) are convinced that organizational variable and CRM experience are major determinants of success.

**2.6.1.2.6 Putting up a proper risk management plan:** Buttle (2009) argues that a massive amount of CRM projects fail- about two-thirds. He further added that some of these projects fail to succeed because of poor project management techniques, lack of organisation focus and resistance to change from end users. He then concluded the importance of identifying potential risks to a CRM project beforehand and then putting in place contingency plans in place. Havlicek et al (2013) posited that a proper risk management plan is an integral part of ensuring quality CRM projects or otherwise conceived as quality management. Agrawal (2003) also argued that the risks management techniques in CRM implementation would be properly developed to prevent failures. He also added that CRM should not take a one-size-fits-all approach,

but companies need to take a unique stance and prepare for any risk that may arise.

**2.6.1.3 Specification of needs and selection of partner (Phase 3):** This is the third phase of the Implementation process and is focussed on finding effective business processes, data review, , identification of technological needs, write requests for proposals, call for proposals, re-evaluation of technology requirements and partner selection (Buttle, 2009). Without delving into much detail of the individual elements, it is important to state that researchers like Piskar and Faganel (2009) believe that defining the business process, helps choose the right CRM partner and ensure project success. Maguire et al, (2007) is convinced that developing a good listening process, that takes customers' needs and perceptions into account, is important to finding the right vendor, which could be through outsourcing, as expressed by Kalaignanam (2013).

**2.6.1.4 Project Implementation (Phase 4):** Bohling et al (2006) believe that CRM implementation depends on so many building blocks or factors which have been laid out in the previous three phases put together. The necessary implementation elements that could determine a CRM project successful would be looked into below.

**2.6.1.4.1 Refine project plan:** This is the first step to the implementation process as expressed by Buttle (2009). During this step, the leadership are encouraged to discuss with the selected partners or vendors to set new milestones and modify the budget

**2.6.1.4.2 Identify technology customization needs:** It is widely conceived that off the shelf software solutions do not necessarily meet the CRM needs of an organization. It is to this end that Pliskin (2005) and Ashok (2007) also believe that there is the need for the customization of CRM applications to meet the unique needs of a given business. Buttle (2009) went ahead to propagate for a gap analysis approach, which entails how gaps exists between the business requirements of a company and the capabilities of the software

provided by a vendor. These gaps are then looked into with the aim of providing modifications to address and accommodate the needs of the company.

**2.6.1.4.3 Prototype design, test, modify and roll-out:** Limbasan and Rusu (2011) highlighted the importance of first having a prototype for testing before roll-out with their SaaS CRM prototype for the real estate industry. Roussinov and Leon (2004) looked at how customer feedback helps refine a prototype and Mei-Yu (2008) believes that effective prototyping and modification are paramount to a CRM success.

**2.6.1.5 Evaluate Performance (Phase 5):** Evaluating the performance of a CRM project is very important as Handoko and Gaol (2012) appraised the adoption of a CRM project by a retail company. They also evaluated the performance of the CRM project along these three dimensions: financial, technology and business yardsticks. Based on this research, it looks imperative for any given firm to gauge how successful her CRM project is along these tripartite dimensions. Abdullateef (2011) evaluated call centre CRM projects and concluded that just a successful technological installation but customer satisfaction and general efficiency, should be used to evaluate the result of a CRM project.

It would now be helpful to briefly look at other key elements for CRM implementation and measurement for success as key elements that make up this program and the right sequence to ensure project delivery (Gentle 2002) would be expressed.

**2.6.1.6 Defining CRM success:** According to Dyche and Longman (2002), this is a critical element of any given CRM program. They believe clearly defining the success metrics of a CRM program is not as easy as it may seem hence, emphasizing the organizational boundaries of CRM, from the start is important. It is therefore imperative for senior executives and programmers to agree on a singular or unified CRM goal. It is on the basis of the complexity of having everyone in an organization seeking towards a common CRM goal and success that Dyche and Longman (2002) advocated for a “Stovepipe” approach to CRM implementation. This approach entails commencing a CRM led transformation from a small scale, like a single business unit like marketing, with an ambitious sectional head, enlisting the support of the technology department in designing a

small scale CRM project for its division. Once this project becomes beneficial to the said department and proves to provide a good return on investment, other departments in the organization can then be included in the horizontal spread of the CRM capabilities, with gradual upgrade of features and steady expansion of user base.

According to Dyche and Longman (2002) this seems to be a better and a safer bet to achieving CRM success than a drastic and colossal approach, otherwise viewed as “just add water” approach. It would now be important to look into some important factors and elements that needs to be taken into consideration when a successful CRM project is anticipated and about to be initiated

**Table 2: Evaluating the factors of CRM success (Source: Dyche and Longman (2002))**

<b>Factor</b>	<b>Ideal</b>	<b>Desirable</b>	<b>Undesirable</b>
Initial Trigger	A C-suite executive or a board member reads about CRM and how it could make the organisation more competitive	A customer executive or line manager attends a conference where CRM increasing sales of a given company is addressed.	A product development manager sees an impressive demo from a CRM vendor.
Sponsorship	An executive that oversees several divisions considers CRM as a competitive tool.	An unconventional and ambitious departmental head experiences the benefits of CRM in his/her department.	CRM is adopted due to a vendor offering massive discounts.
Objective definition	Effective customer experience, increase in sales and customer loyalty	Enhanced customer interactions	To include CRM to the IT repertoire for the sake of having a box ticked

Solution selection	Permitting business drivers define CRM functionality	Platforms produce process efficiencies	Abrupt and spontaneous selection of a vendor
Operating environment	Merging CRM project with existing IT infrastructure.	A well connected CRM environment linked to relevant data sources	Independent CRM platform
User community	Employees from a midst of business units utilising CRM	Company employees or users from a few department benefiting for CRM	Operational CRM accessible by a unique group
Efficiencies	Using CRM effectively to make better strategic decisions	Automation in the business processes leads to more efficiency	Automation in this aspect contributes to business process efficiency
Measurement	Evaluate customer churn, call waiting times, volume of complaints and sales figures	Improvements in marketing campaigns and better closing of sales.	Complete integration of CRM to other operating systems on as many desktops as possible.

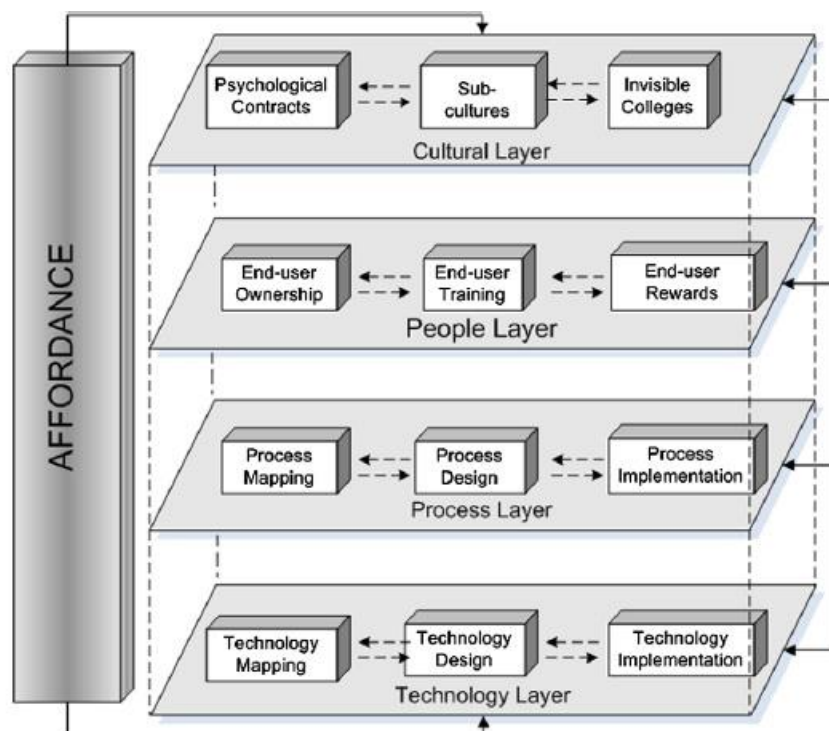
The above table presents the variables that could trigger CRM adoption and some attributes of a successful implementation. Oshita and Prasad (1999, in Dyche and Longman) discovered four yardsticks for measuring CRM success and they are:

- CRM's capability to have an effect on corporate strategy.
- Seamless and successful technology integration
- Improved strategic partnerships
- Embrace of CRM-laden technologies.

The above elements seem to be a great measurement of CRM success as the frameworks and approaches of CRM project implementation would be presented below.

### 2.6.2 Social-technical conceptual framework

Finnegan and Currie (2010) came up with this framework for CRM implementation on the backdrop of two researches. The first research was one that looked into CRM implementation from a knowledge integration perspective and also looks into contextual elements like people, culture, process and information technology. The other research that influenced this framework was an in-depth research on enterprise systems for a telecommunication firm (Nandhakumar et, al, 2005, in Fannegan and Currie 2010). This framework captures the dual effects of contextual forces- as the restrain to a certain action could simultaneously lead to another (Finnegan and Currie, 2010). This framework would be discussed in much detail below:



**Figure 2: Multi-layered model of CRM strategy implementation (Source: Finnegan and Currie (2010))**

The authors behind this framework (Finnegan and Currie) are convinced that CRM implementation needs to take contextual factors into consideration and it is to this regard that they promoted the concept of Affordance.

**2.6.2.1 Affordance:** in this context, it is viewed as the adaptive tendencies of structures contextual elements for humans. In a more specific sense, this involves the dual effect of technological structures and human capabilities in enabling human interactions on one hand and restraining it on the other. In a bid to developing a multi-layered framework to CRM implementation, Finnegan and Currie (2010) are establishing a relationship between people, culture, processes and technology with affordance. It would now be important to look at each core layer and their relevance in CRM implementation.

**2.6.2.2 Cultural Layer:** This according to Finnegan and Currie (2010) embodies the psychological contracts and contextual cultures that determine CRM implementation. Other researchers such as Chang et, al (2010) also believe in the role organizational culture plays in CRM implementation, as there is also a need for a synergy between the IT and marketing departments. Finnegan and Currie (2010) explain that the term 'invisible colleges' refers to a psychological contract between different divisions of a company or social structural partnerships. It basically focuses on the presence of a culture that makes the sharing and utilization of information across different divisions easy. To this end Labus and Stone (2010) agree to this, as they believe the softer side of business in the form of organizational culture is very important to CRM projects. On the contrary, Bavarsad and Hosseinipour (2013) carried out a study that expressed that organizational culture does not have an impact on CRM success.

**2.6.2.3 People layer:** This layer is a very important one as it looks into the critical role collaboration amongst people, from marketing, IT, sales and service facilitating the successful implementation of CRM projects (Finnegan and Currie, 2010). Due to the interplay of a diverse group of people, there might be a challenge with getting everyone on board to believe on the CRM strategy. To this end, researchers like Lassar et al (2008) advocate for the identification and selection of influential characters, or otherwise seen as champions (Krell 2005), to drive the objectives of the CRM program, throughout the organization



(Kennedy et al, 2005). A change champion is therefore needed to convince C-suite executives to continue sponsoring the program and all other employees to support its success (Saini et al, 2010).

**2.6.2.4 Process Layer:** This determinant of CRM implementation looks more at the process-related variables (Bohling 2006). As such, it is very important that if a company aims to successfully implement CRM, then changing the process or business approach from a product-laden to customer-centric one is vital (Long et al, 2013). Several researchers have pointed out that if CRM projects need to succeed there have to be a closer focus on the customer and not the product. Fannegan and Currie (2010) believe that the process layer is crucial to CRM implementation, but they also believe that the weighing of this layer with other layers in the framework is crucial to ensuring a successful CRM implementation.

**2.6.2.5 Technological layer:** CRM is very reliant on this layer as these projects are technological in nature, also very important in the collection and analysis of customer data.(Khurana and Chaudhary,2010). Data correctness and integrity are two technological elements to the successful implementation of a CRM project (Fannegan and Currie, 2010). Companies spending on CRM software tools are good but businesses are not to stop here as they ensure that data is cleansed (Reid and Catterall, 2005) and gathered into a standardised database (Peltier et al, 2013)

On the other hand works, such as Kaushik and Kundan (2009) looked at the important elements to CRM implementation like CRM orientation, selection, deployment and fulfilment of the CRM objectives. This would be looked at below.

### **2.6.3 Two-step CRM implementation process**

Kaushik and Kundan (2009) came up with a two-step process to successfully implementing a CRM projects.

**2.6.3.1 CRM Orientation:** The first step to implementing or executing CRM initiative is to design a CRM orientation that would help shape up the given project. There is also the need to have an effective synergy of important elements

like processes, technology, employees and strategy. To instil the right attitude and orientation within the company, it is very important to create very realistic CRM expectations and ensure a clear understanding of the role of technology (Kaushik and Kundan, 2009). CRM implementation is not an end in itself but a means to an end- which led Campbell (2003) to opine that just implementing a CRM project will not automatically result to sales potency or success. Teo et al, (2006) advocate for a CRM project to yield its rewards that there has to be a better mentality for the sharing of data amongst different department and Stefanou et al (2003) preferred for the development of a customer-centric attitude amongst employees, to enable the high level of treatment of customers from one department to the other. Finally, companies need to orientate employees to be more flexible (Kubina and Lendel, 2012) adaptable and open to change (Shum et al, 2008) as CRM does bring about a new way of doing the old things and better personalisation of service (Jackson, 2007).

**2.6.3.2 Selection of CRM technology:** The selection of a given technology to propel the CRM project is a very important stage in the CRM implementation process (Kaushik and Kundan, 2009). CRM technologies are very important tools in enabling customer acquisition (Peppers and Rogers 2011) and provide effective database that facilitates quality interactions. A great proponent of CRM, Greenberg (2001), highlighted the essential technological elements of CRM: Front office systems for realizing sales, marketing and service on one hand; and a data cache or storehouse- a back office application for an integration and evaluation of data.

Kaushik and Kundan (2009) enthuse that the choice of CRM technology, demands a meticulous consideration and thought process by a given company. Other researchers like Schulz (2011) advocate for a thorough selection process that involves a committee with representatives from all divisions and interests group. Other necessary factors that aid the proper selection of the CRM vendor includes, taking a proper stock of the needs, concerns and aspirations of individuals from all the departments. In addition, there is the need to have project champions in the form of senior executives, with an owner-managers attitude as suggested by Nguyen and Waring (2013), which would be very instrumental in the selection of the appropriate vendor. They would also help to orientate the workforce on the reasons behind the selection of a specific vendor. It

is also important to note that the selection of the vendor and CRM technology should be adequate enough to meet the pre-defined CRM goals (Luck and Lancaster, 2013).

#### **2.6.4 The typology of CRM implementation strategies**

Langerak and Verhoef (2003) developed a broad typology of CRM implementation strategies that comprise of customer intimate CRM, operational excellence CRM and tactical CRM.

**2.6.4.1 Customer intimate CRM:** Kim et al, (2012) shares in the same sentiments with Langerak and Verhoef (2003) on this approach, as focused on developing a long-term relationship with the customer. This approach in the implementation process is highly focused on the enduring and long-term relationships that are built with customers. Customer centricity is pivotal to this approach as researchers argue that this is critical to any CRM implementation (Tarokh and Shojaie, 2013). It is also believed that customers' attitudes towards CRM should also be an important element to the customer intimate CRM approach (Sangle and Awasthi, 2011).

**2.6.4.2 Operational excellence CRM:** This tier of CRM implementation as conceived by Langarek and Verhoef (2003) pertains with the role the organizational leadership plays. The top leadership of an organization are expected to clearly define the CRM strategy for employees to understand. The top leadership are also expected to regularly communicate the required policies and procedures for the proposed CRM project (Burr et al, 2007). Basically, the CRM implementation requires an enthusiastic and charismatic senior management to engage the employees in believing in the worth of the project (Love et al, 2009).

**2.6.4.3 Tactical CRM:** Langarek and Verhoef (2003) believe that it is very important to distinguish between strategic and tactical CRM that would lead to more effective understanding and implementation of CRM. On one hand, the strategic CRM looks at the more expensive projects in the short run but more effective in the long run. And the tactical, which focuses on the less expensive in the short run and less effective in the long run. Knowing when to adopt one form

over the other is the main lesson. The reasons why CRM fail as conceived by different researchers would now be looked into.

## **2.7 REASONS FOR CRM FAILURE**

Finding out the reasons why CRM projects fail is a cardinal aspect of this investigation and looking at what other researchers have expressed would be looked into at this juncture. Kale (2003) shares sentiments with technology giants Gartner, who say about 60% of CRM projects will fail. While Becker et al (2010) report that only a third of all CRM projects witness measurable and visible improvements in performance. They went further to add this staggering statistics that two thirds of the companies that commenced a CRM program either endured losses or had an absence of core improvements in company performance. Gilligan and Wilson (2003) also added to this dire statistics of CRM failure by stating that one in five CRM programs truncated customer relationships. Rigby et al, (2002) wrote an article exploring four core reasons why CRM projects fail. In this article, they pointed out some of the common failures that have been attributed to CRM. The next section would look into the reasons why CRM projects fail, as expressed by researchers.

### **2.7.1 Implementing CRM before creating a customer strategy**

Kale (2003) is convinced that having a customer strategy in place is a prerequisite for any CRM program to excel. A good understanding of the customer acquisition and retention strategies and efforts at building genuine relationships are important to creating the customer strategy. In a similar regard, Rigby et, al (2002) are convinced that the needs, desires and preferences of the customer should drive company's customer strategy. CRM should only be adopted when the customers' preferences have been identified and plans have been set in motion. Stone (2003) put it simply by stating that CRM projects fail, because companies ignored customers' needs.

### **2.7.2 Implementing CRM before your organisation is customer ready**

Rigby et al, (2003) believe an organisation should be customer oriented and CRM should only serve as a consolidation and not an initiator of a customer-centric ideology. An investigation into the causes of CRM failures revealed that the core

causes of about 87% of the scenarios under study, showed lack of proper change management processes (Kale, 2003). Becker et al (2010) are convinced the absence of a proper customer-centric and inclusive culture could make the best of CRM technologies fail.

### **2.7.3 More technology is not always beneficial**

A healthy hybrid approach to CRM is advised, which pays much attention to the non-tech aspect of the processes as well as the tech (Kale, 2013). Other researchers also believe that CRM does not necessarily have to be very tech-intensive, for it to succeed. Having a customer centred strategy guides a company to wisely choose when a high or low technological solution would be more beneficial (Chen and Popvich, 2003). Light (2003) also says that CRM projects sometimes fail because businesses assume technology to be utopia.

### **2.7.4 Stalking and not wooing customers**

According to Rigby et al (2002) it boils down to forging a beneficial relationship with customers that value you and not the ones that are uninterested and may consider you a stalker. Researchers advise on the adequate use of market research to explore interested and disinterested customers, and their choice medium of communication (Davids, 1999). Nairn (2002) also posited that CRM fails when it fails to be a conversation relationship management (CRM) - building trusted and valuable relationships with customers that are interested.

### **2.7.5 Lack of communication**

Communication is a critical element towards a successful or unsuccessful CRM project implementation. Some CRM projects seem to fail due to a lack of buy-in from the users (Buttle, 2009) as a result of a poor communication process or employee engagement (Foss et al, 2008).

The above mentioned reasons are by no means exhaustive, as other researchers such as Woodcock and Starkey (2001), Bielski (2003), Coltman and Sara (2007) and Morgan (2009); put forward the following reasons as to why CRM projects fails:

- Failure to properly think through the strategy and the business model
- Inadequate skills to execute the project
- Too much focus on technology and less investment on skills and data management
- Inexperienced managers finding it had to have a good sense of project direction
- Inflexibility and lack of readiness
- Selection of the wrong partner or vendor
- Overselling technology at all cost
- Doing too much too soon

## **2.8 CRM SUCCESS REASONS**

It is important to state that the opposite of the reasons why CRM projects fail, makes the factors behind the successful implementation of CRM projects. Also the earlier sections have clearly shown the proper project steps, elements and factors that make up the successful implementation of CRM projects. So a lot would not be stated in this section so as to prevent repetition or reinventing the wheel. This notwithstanding, it would be imperative to conclude this section with some of the precise reasons behind successful CRM projects as expressed by Woodcock and Starkey (2001)- and they are: Clear, detailed requirements, strong business commitment, clear project controls

## **2.9 THE ESSENCE OF CRM IN FINANCE, GOVERNMENT AND TELECOMMUNICATION SECTORS**

This project looks into the implementation of CRM projects within finance, government and telecom sectors respectively.

### **2.9.1 CRM in the financial sectors**

Griffin et al (2009) conducted a research on the implementation and essence of CRM in a financial advisory firms based in Russia. It was also added that the financial sector is one of the largest sectors employing CRM solutions. They then added that the reasons why some CRM projects in the financial sectors fail are

due to strategy, cost, absence of a backup plan and business culture. Foss (2002) looked into more of the essence of CRM within the financial sectors as he believes retail banks and insurers were early adopters of CRM technologies before investment banks joined the lots. Investment banks are considered to be late adopters due to their fewer client base. Nonetheless, investment banks would adopt CRM if it would help them identify, attract and retain the appropriate clients. CRM within the financial sector would succeed as long as banks understand what their client wants from them (Alsmadi and Alnawas, 2011). Banks are burdened by these needs: cost reductions and efficiency in service, better transparency (accountability) and ease with dealing with fewer banks (Coltman 2007). It is therefore advised that, different requirements and techniques in relating with clients should be properly adopted before a CRM system is implemented (Salami 2009). Mennon and O'Connor (2007) also added that retail banks need to focus more on the elements of CRM that would generate genuine customer commitment.

### **2.9.2 CRM in government or public sector**

Rui and Batista (2007) looked at the essence of CRM with the public sector on government and how it builds reputation of this sector. They further identified the customers of government to be citizens and businesses. Government are turning to CRM to become more responsive to the public and change the notion that they are: bureaucratic, inefficient and too slow (Al-Khouri, 2012). The competitors' category of stakeholders has seen the increase in the adoption of CRM by the public sector (Pang and Norris, 2002). These public agencies have stakeholders that comprise of other public agencies, labour unions, religious groups and community associations (Desai and Sahu, 2008). This therefore makes the rational for the adoption of CRM, which could enable healthy relationships, promote policy making and participative democracy (Rui and Batista, 2007).

### **2.9.3 CRM in telecommunication**

Daramola and Adekunle (2013) studied the impact of CRM on the business performance of African telecommunication giant, MTN. The findings revealed that CRM has a great impact or effect on the business performance of telecom

companies like MTN, through enhancing communication with customers and personalising the product offerings. Jallat and Ankarani (2008) posited that firms competing in the telecommunication industry can be deemed as the best practice or benchmarks of CRM due to the very competitive and convergence nature of the industry. Telecommunication firms are continually modifying and upgrading her CRM platforms to gain more insights into customers, which would lead to better relationships and growth. Zablah et al (2012) also looked into how the use of CRM impacts upon the telecommunication companies with data generated from over 295 customer firms. They discovered that CRM has a positive effect on the way telecommunication firms perceived customers need and priorities.

## **2.10 CRM AS A SOURCE FOR COMPETITIVE ADVANTAGE**

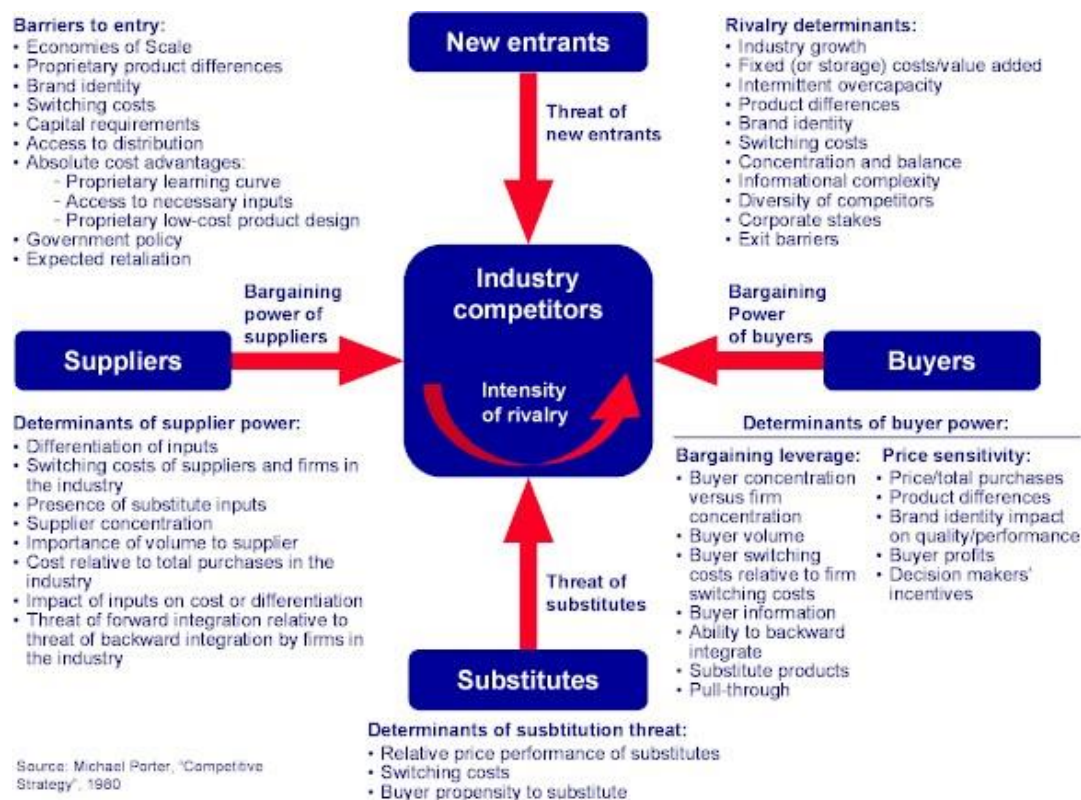
Zineldin (2005) believes that the cardinal purpose of marketing strategy is to develop competitive advantage. He further added that competitive advantage bestows customers with higher value when compared to competitive offerings. Wahab et al (2010) pointed out Porters two universal ways of establishing competitive advantage. They are establishing competitive advantage through low-cost supplier or by distinguishing in a distinct and beneficial manner.

It would be out of place to express how CRM could serve as a source of competitive advantage without looking into Porters five forces of competition.

### **2.10.1 Porter's five forces of competition:**

Kar (2011) views Porter as the guru of modern day market strategy- through the formulation of theoretical frameworks that was inspired from Industrial Organization economics. He further added that, Porter's framework presents five forces that determine the competitiveness, potential and profitability of an industry.





**Figure 3: 5 Forces of competition (Source: Kar (2011))**

Dobbs (2004) conceives of the five forces that define the structure of all industries and in most part presents the principles of competition and the key triggers of profitability in an industry. The five forces are viewed as the threats posed by the competitive rivalry, powerful suppliers, powerful buyers, potential new entrants and substitute products (Porter and Kramer 2002). The combination of all these forces determines how profitable an industry is (Snowdon and Stonehouse, 2006).

According to Karagiannopoulos et al (2005) the framework expands the supply-demand evaluation of individual markets in various ramifications. They added that this framework had impacts on horizontal dimension, as it swayed the focus from two-stage horizontal chains (supplier and buyer) to a three staged one (supplier, buyer and rival). This framework not only looks at competition of rivalry but also the competition of value in a given industry (Siaw and Yu, 2004).

### **2.10.2 Applying Porter's five forces of competition to CRM**

Before delving into how Porter's 5 forces of competition could be applied to CRM implementation, it would be pertinent to have a brief overview of the classifications of CRM as expressed by Karimi et al (2001)

- Operational CRM products: These are offerings designed to improve customer service, digital marketing and salesforce automation.
- Analytical CRM products: These are specifically for analytics, big data warehouses, enhancing relationships etc.
- Collaboration CRM products: Products in collaboration are used in building online communities, Social CRM platforms, business to business customer interactions and customization services.

With the above knowledge, it would be essential to adopt Porter's five forces of competition to understand how successful implementation of CRM could be a source of competitive advantage. Adebajo (2003) expressed that Porter's five forces framework could be used to understand the potential and competitive benefit of adopting any of the above mentioned CRM classifications (operational, analytical or collaborative) depending on how an industry is characterised by strong rivalry with competitors or threat of substitute products. He further added that, organizations should strive to implement solutions that enhance efficiency and clearly differentiates the service. In addition, in industries where there are higher barriers or requirements to entry (like aerospace and technology), firms should implement a CRM product that is customer experience-laden, where customers have input to the design of the product.

Industries where buyers have greater bargaining power (e.g telecommunication), a more marketing and sales based CRM product should be offered. Finally, in an industry where a supply appears to have the upper-hand or more buying power, a system that transfers more responsibility to the supplier would be recommended.

### **2.10.3 CRM as a source for competitive advantage**

Tuominen et al, (2003) carried out a research that looked at how successful adoption and implementation of CRM serves as a source for competitive

advantage. Successful implementation of CRM is as a result of developing relationships that is beneficial to the firm and its customer experience (Long et al, 2013). A dedicated relationship with the customer therefore, is a product of intelligence that has emanated from how a firm listens and communicates with the customer- also how it is able to meet the demands and aspirations of the customer (Luck and Lancaster, 2013). This is the premise of any CRM project, which cannot be copied due to the organizations unique ways of listening and communicating with her customers to provide optimal value that gains competitive advantage.

The argument is that an impressive business performance and competitive advantage is a product of the unique learning capacity in understanding and meeting the needs of customers (Ivanovic et al, 2011). Therefore, successfully implementing and adopting CRM could help a firm be more competitive as it improves her market intelligence and ability to create distinct value to customers.

In their study, Tuominen et al, (2003) further tested hypothesis which revealed that the higher the level of customer and market orientation a firm has the more competitive advantage. It is to this regard they expressed the two main elements of a competitive market as the customers and rivals. They concluded by stating a chronological sequence on how CRM could serve as a source of competitive advantage with this thought:

“The higher the level of market orientation (customer insight), the stronger the impact of relationship orientation, knowledge and skills, and integration and alignment of processes (CRM) will be on the high level competitive advantage and business performance (Tuominen et al 2003: 1233)”

Based on the above mentioned, it is imperative to state that porters five forces of competitive advantage, has helped in the understanding of how CRM could serve as competitive advantage as written by other researchers. With the conclusion of the review of related literature it would now be important to gather and analyse findings to ascertain how the research questions are effectively addressed and objectives actualised.

### **3.0 RESEARCH DESIGN AND METHODOLOGY**

A research design as defined by Burns and Grove (2009) refers to a blueprint for executing a study- with optimal influence over factors that may interrupt with the validity of the findings. In a more precise manner- Bryman and Bell (2007), conceive of it as the relevant basis for the collection and analysis of data. While Collis and Hussey (2003) view it as an in-depth strategy that shapes the investigation and delivers answers to the identified research questions.

Research design and methodology are considered to be essential parts of any investigation as Hussey and Hussey (1997) are confident that it provides a broad spectrum of the research exercise which embodies these core issues: what data is collected, when it is collected, why it is collected and how it would be analysed?

Nonetheless, Cooper and Schindler (2001) also conceived of it as a plan for actualising the main objectives of the investigation through answering the stated questions. Further to this, they expressed that choosing a research design could be very challenging due to the plethora of techniques, methodologies and sampling plans that are in operation. These research techniques are often selected on the basis of the nature of the investigation and its core objectives. Secondary data such as journal articles and text books have been instrumental in classifying the nature of a research into descriptive, exploratory, causal and explanatory dimensions (Saunders et al, 2007).

### **3.1 THE PURPOSE OF RESEARCH CLASSIFICATION**

Grinnell and Unrau (2010) believe there is always a real intention and justification behind any given scientific research. In line with this, Wiedersheim-Paul & Eriksson (1999) put forward three research purpose classifications as follows:

#### **3.1.1 Exploratory research**

Stebbins (2001), carried out an in-depth work on the meaning of exploratory research, as he conceived of it as the inquisitive and curious process of examining and investigating a phenomenon or a subject matter.

It is also viewed as a type of research that is used to clarify and shed light on a given problem (Bryman and Bell, 2003). Saunders (2000) further saw it as a type of research that examines and dissects research problems which are hard to determine. It is more relevant in scenarios where the researcher finds it challenging to identify previous studies.

### **3.1.2 Descriptive research**

This form of research is conceived as a way of generating apt description of the variables in the problem model (Creswell 2014). This type of research makes a deeper examination of a problem than the exploratory type, as it is aimed at validating and describing the features of the pivotal issues under investigation (Collis and Hussey, 1997).

### **3.1.3 Explanatory research**

Explanatory research is geared at studying problems in a bid to explaining the relationship between two or more variables. This form of research is also sometimes considered as casual research (Blatter and Haverland 2012). In the event of a research problem, that strives to seek cause-effect relationships, explanatory research is appropriate to study and explain what causes leads to respective effects (Yin, 1994). In this form of investigation, the researcher progresses through merely describing the features to explaining the outcome of the phenomena under study. (Bryman and Bell, 2003).

Based on the above research classifications, it is imperative to express that this investigation is exploratory and descriptive in nature. This is because this research seeks to explore and generate patterns (than merely testing hypothesis) on how CRM projects serve as a source of competitive advantage, for government, financial and telecommunication companies. This research aims at gaining insights and understanding to how a successfully implemented CRM project could serve as a source of competitive advantage, through the adoption of an unrestricted access to a wide range of ideas and research findings. On the descriptive angle, this research aims to ascertain the factors that lead to the failure of CRM projects.

It is against this backdrop that this research adopts a mixed method approach, which utilises statistical analytical method to analyse the data collected via questionnaires and a qualitative technique to evaluate the findings derived through interviews

There are a plethora of techniques that exists in the analysis of research findings but due to the mixed nature of this investigation, adopting a quantitative and qualitative process is imperative. It is to this effect that the thematic data analytical method will be utilised to analyse the data generated from interviews. Burnard et al (2006) view this form of data analysis as an inductive process that is geared at analysing transcripts, identifying themes and collating the themes. In addition, due to the questionnaire survey, a quantitative data analytical method that utilised charts and the Pearson's correlation technique will be adopted. Saunders and Lewis (2012) conceive of the Pearson's correlation method as a way of finding the relationship between a minimum of two continuous variables. The value of this type of correlation is found between 0.00 (no correlation) and 1.00 (perfect correlation). There was a strong need to find the correlation between two variables which are the core of this research, the variables are; 'CRM projects' and 'gaining competitive advantage.' Thematic analytical method helped in the categorisation and coding of the data, which helped to measure the frequency (the number of times each theme was mentioned) and finally with the utilisation of the Pearson's correlation, to find out if CRM projects help a company gain competitive advantage.

### **3.2 DATA COLLECTION METHOD**

The data collection method for any given research largely depends on the structure, goals and stipulated questions under investigation (Creswell, 2013). It is on the basis, of the exploratory and descriptive attribute of this research, that there is a requirement for an in-depth interview process and questionnaire survey, as a source of producing primary data. Conducting an extensive interview exercise and questionnaire survey is imperative to understanding how the implementation of CRM projects could serve as a source of competitive advantage, for companies in government, financial and telecommunication sectors. The segment is therefore geared at emphasising the utilisation of an interview and questionnaire survey in generating primary data which Collis and Hussey (1997:17) tag as the 'original data collected at source' for any given research.

### 3.2.1 Primary Research

Primary data are an important aspect of any given research, as they spawn or are generated through several methods like focus groups, participant observation, questionnaire survey, qualitative interviewing, text analysis and discourse analysis (Bryman and Bell, 2007). With the benefit of the listed primary data collection procedures, it is apt to establish that this investigation is utilizing a combination of an in-depth interview and questionnaire exercise, as interviews highlights not only the details of the responses but the analogies, metaphors, nuances, languages and terms used by the respondents (White, 2012). This research adopts the interviewing of respondents and a questionnaire survey of individuals from different companies- public/government institutions, financial and telecom sectors- and it does not include a case study approach. A few of those who completed the questionnaires survey were from industries outside of the three core areas (finance, telecom and government).

### 3.2.2 Interviews

Interviewing in any given research is a very efficient way of collating data by discovering what respondents think about a particular phenomenon with the use of triggers, probes and Prompts (Creswell, 2013). Collis and Husey (1997) argue that research interviews, requires an intense and systematic process but that there is no one best method to conduct an interview, as a structure is highly premised on the nature of the investigation. It is against this backdrop that this research aims to adopt an interview process to derive an understanding of how successfully implemented CRM projects, could serve as a source for competitive advantage for companies- mostly within the government, financial and telecom sectors.. It is now imperative to highlight the three types of interviews, in a bid to select the appropriate classification for this research.

**3.2.2.1 Structured Interview:** This type of interview process, presents an inflexible format of generating responses from explicitly stated questions, tendered to the respondents (Greenfield, 1996). Pettersen and Durivage (2008) opine that in this type, questions and response categories are established in

advance and respondents or interviewees are expected to choose from the stipulated or fixed outcomes.

**3.2.2.2 Semi Structured Interview:** In semi structured interview, Creswell (2013) is of the opinion that questions forwarded are more flexible as the respondents have a great degree of allowance in their responses. It is also believed that this type of interview provides a likely possibility for discussion and slight digression by respondents (Galletta and Cross, 2013).

**3.2.2.3 Unstructured Interview:** In this type of interviews, questions seem to emanate from the present context and flow in a natural way without premeditated wordings or topics (Cooper and Schnidler, 1998). It is also conceived as a way of conversation or dialogue that permits the interviewer presenting a single question or range of topics and triggers that allows the respondent to address freely- without constraints (Bryman and Bell, 2003). Questions could emerge and evolve in the course of the interview process (Creswell, 2013) that facilitates respondents to produce in depth analysis and a plethora of information about the phenomenon under investigation (Weinberg, 2002).

Based on the overview, the research utilised a combination of structured and semi-structured interviews. Thirty respondents completed the questionnaire, spanning across an array of sectors. In addition, three very experienced CRM thought leaders and practitioners were interviewed, in a semi-structured manner, giving the interviewees room to dig deeper into their expertise.



### 3.3 THE INTERVIEW AND QUESTIONNAIRE GUIDE

Interview guide, is very important in the production of primary data for any given investigation or research. It is commonly argued that the interview layout or guide identifies topics, concepts and triggers that are required to ensure the relevant data are collected (Brinkmann and Kvale, 2014). It is in this regard that the research questions forwarded for this research would be expressed in line with the questions that would be posed to respondents.

**1) Question 1:** What role do CRM applications play in organizations? It is in a bid to answer this research question that two questions were generated on the interview guide. The questions geared at providing responses to this research question are: 1) How much do you rely on CRM applications in your business function? 2) What do you think are some of the important merits or advantages of implementing a CRM program? These two questions would mostly generate responses from respondents that would assist in tackling the first research question focused on the role of CRM projects.

**2) Question 2:** What are the causes of CRM failures? On this aspect the question fashioned is: what are the barriers and challenges encountered in implementing CRM projects? Responses given by interviewees may provide more probing to generate a rich array of data for analysis.

**3) Question 3:** What are the factors that are responsible for the successful implementation of CRM projects? In a drive to address the research question, questions posed to respondents are: What would you say are the pre-requisites for the successful implementation of CRM projects? After a successful implementation of a CRM project, what factors would you say were largely responsible?

**4) Question 4:** How can a successfully completed CRM project serve as a source of competitive advantage for companies within the telecom, government and financial sectors? This research question centres on how CRM implementation could help companies be more competitive. In this regard the interview question that would be posed to respondents is: In what way could successful implemented CRM projects help a company to gain competitive advantage?

The climax of this research is to forward a framework and recommendations on how companies could successfully implement CRM projects- and to utilise these projects to gain competitive advantage.

### **3.4 SAMPLING PROCEDURES**

Sampling methods in research are categorised into three: representative, probability and non-probability samples. Firstly, a representative sampling method generates a broad representation of the population under study. Secondly, the probability sampling procedure entertains a random selection approach that presents every part of the population with a possibility of being chosen. The non-probability sampling method involves a systematic and well thought out process that presents the opportunity of experiencing some portion of the population being more represented than others (Bryman and Bell, 2003; Bryman, 2012).

#### **3.4.1 Sampling Method for respondents**

There are a series of sampling methods that exist, but for the purpose of this research, the purposive type of the non-probability sampling is utilised for this research. The purposive type of the sampling method is in tune with non-probable criteria, which are further dissected into judgement and quota sampling (Bryman, 2012). The judgement classification of purposive sampling is employed in this research, as it entails the identification of respondents, based on their wealth of experience of the phenomenon under investigation (Collis and Hussey, 1997). It is in this regard, that the researcher sought after experts and managers in the companies. On the aspect of personal judgement element, which is exemplary of a purposive sampling method, is adopted, in selecting thought leaders and professionals like CRM executives, managers, project managers, end users and consultants.

#### **3.4.2 Sampling Size**

In an investigation of this manner, sample size is conceived as a subset of the population that is imperative for the phenomenon under research. The logical reasoning in selecting a sample size is determined by time and cost involved in the

given research (Bryman, 2012). The sample size of this research is highly influenced by the limited time frame for submission of the dissertation and the cost involved in conducting interviews outside the UAE. It is to this regard that the respondents picked for interview are based within the UAE and those for the questionnaire survey are spread across a few countries.

### **3.5 Limitations of Study**

The mixed methodological (qualitative and quantitative) nature of this research, coupled with the utilisation of an interview and questionnaire exercise, presents certain challenges as Yin (2003) conceive of it as a possible limitation or hindrance of any given investigation. Bryman and Bell (2003) believe that data produced from a small sample is difficult for the purpose of generalisation. It is to this regard, that it ought to be recognised that a potential shortcoming of a limited sample size, which is restricted to the UAE vicinity, could serve as a possible challenge to the generalisation of findings.

The reluctance of CRM experts and professional in disclosing some of their organizational CRM challenges and internal dynamics, could impact on the quality of their responses and hence outcome of the research findings. In addition, the low rate of reply by some experts and thought leaders, proved to be a limiting factor for this research. To this effect, only 30 questionnaire surveys were completed and 3 interviews conducted. This may be a limitation to this research, due to the small number of respondents. This was due to the Christmas holidays, as so many of the respondents had a lot of workload to complete after the festive break. Regardless, the researcher utilised the vast CRM knowledge of the respondents, to succinctly and adequately address the questions of this research.

### **3.6 Reliability and Validity of Research**

Reliability is focused on the credibility of the findings (Creswell, 2013) or ensuring that the strategy adopted materialises in a uniform finding or outcome (Collis and Hussey, 1997; Saunders et al, 2007). It is to this effect that the literatures reviewed as secondary data, are products of seasoned authorities in the field of CRM in the

business environment. In addition, the map of the questionnaire and interview process and respondents selected, would lead to a reliable and decisive outcome.

Importantly, the concept of validity refers to 'the extent to which the research findings accurately reflect the phenomena under study' (Collis and Hussey, 1997:64). It is against this backdrop, that the finding produced from this research is geared towards understanding the reasons why CRM projects fail and how CRM projects serve as a source of competitive advantage for firms in government, financial and telecom sectors. The findings garnered from respondents, that spanned several industries (including the core industries of financial, telecom and government), shows how valid and widely representing the views are.

## **4.0 RESULTS AND DATA ANALYSIS**

In any given research, it is widely argued that the technique adopted for analysing data is determined by the type and method of data generated (Creswell 2003). Parylo (2012) expresses that quantitative researchers adopt a plethora of strategies which comprises of experimental designs, correlational studies and general statistical methodologies to test given hypothesis. In terms of qualitative research approach, he added that the common types used to analyse data are phenomenology, grounded theory, case study and narrative analysis. Creswell and Clark (2007) saw the benefits of both methodologies and looked into a blend between the two, to what is known as mixed method studied. They saw it as a pragmatic approach to research- with a view that research does take place across an array of contexts like social, historical, political and others.

It is against this backdrop that this research adopts a mixed method approach, which utilises statistical analytical method to analyse the data collected via questionnaires and a qualitative interview technique will be used to evaluate the findings derived through interviews.

### **4.1 QUANTITATIVE ANALYSIS OF THE QUESTIONNAIRE**

Firstly, a quantitative data analytical method comprising of charts are used to analyse the questionnaire responses. In addition, the Pearson's correlation coefficient is also adopted to find the relationship between 'CRM projects' and 'gaining competitive advantage.' A total of 30 questionnaires were completed by respondents, of which the quantitative data would be analysed. Each of the question posed to respondents, would be analysed below, showing their ranking, frequency and how they relate to the dependent variable. On the other hand, a thematic analytical process was utilised to analyse the qualitative data generated through interviews. Bernard et al (2006) viewed this form of data analysis as an inductive process that is geared at analysing transcripts, identifying themes and collating the respective themes.

The researcher discovered the need to adopt a mixed method research comprising of charts, correlation coefficient and themes. These analytical methods are very complementary in nature, because a thematic approach in analysing the qualitative

data also helped in the coding of the terms (mini themes) that were counted to form the variables X and Y, which were crucial for the Pearson's correlation coefficient.

In addition, the generation of themes from the interview also helped in gaining better understanding to the different variables or options that were available to respondents in the questionnaire.

#### **Question 1: What is your relationship with CRM?**

This first segment of this question, presented respondents with an opportunity, to state what sector they come from, comprising of: finance, government and telecommunication. The table below expresses the number of respondents per sector:

**Table 3: Respondents and their respective sectors**

<b>Sector</b>	<b>Number of respondents</b>
Government	6
Telecommunication	6
Financial	5
Other	15

The above table shows a representation of the three core sectors of this research: government, telecommunication and financial services. It also gathers a lot of data from sectors outside of the three core areas, which increases the universality and wider application of the findings.

The next section focused on the background and relationship the respondents have with CRM. It does comprise of elements such as vendor, sponsor, end user and consultant.

**Table 4: Relationship between respondents and CRM**

<b>Relationship with CRM</b>	<b>Number of respondents</b>
Consultants	19
Sponsor (CRM Project sponsor)	6
Vendor	2
User	5

**Question 2:** Have you used any CRM system in your organisation and if 'yes' for how long?

The final background question for respondents was a look into how long they have used or been associated with CRM. The table below would indicate the length of time the respondents have been associated with CRM.

**Table 5: Length of time respondents have been associated with CRM**

<b>Length of time associated with CRM</b>	<b>Number of respondents</b>
Less than 1 year	4
1-3 years	8
Over 3 years	17
Never used CRM	3

The above table shows how about half of the respondents have had a longer association with CRM. Having drawn up background information about the respondents, it will now be pertinent to individually analyse each question, identifying how they rank and correlate against the dependent variable.

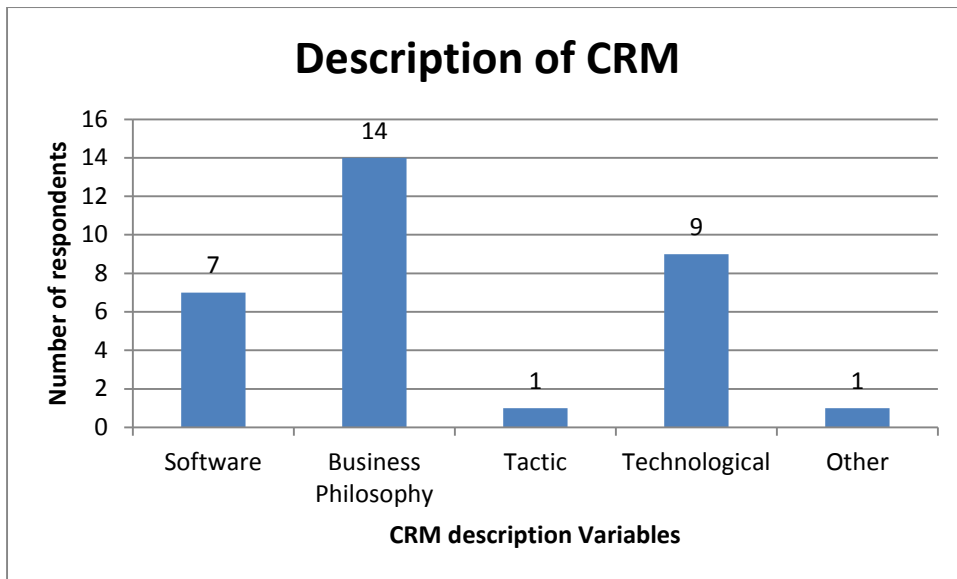
**Question 3:** What best describes CRM?

This question presents two variables: an dependent variable, 'Description of CRM' and independent variables which are: software project, business philosophy and strategy, tactic, technological tool and others. The aim is to determine which of these dependent variables, best correlate with the description of CRM based on the collated data. Below indicates how the 32 respondents describe CRM

**Table 6: Description of CRM**

<b>Software Project</b>	<b>Business Philosophy</b>	<b>Tactic</b>	<b>Technological Tool</b>	<b>Other</b>
7	14	1	9	1

Based on the responses, it clearly indicates that a higher percentage of the respondents believe that CRM is a business philosophy.



**Figure 1: Description of CRM**

The above chart clearly displays that about 14 of the total 32 questionnaire respondents, conceive of CRM as a business philosophy. That is approximately about 44% of the total questionnaire feedback describing CRM as a business philosophy, than solely a technological or software project. CRM as a technological tool seems to be the second highest ranked variable. Digging deeper into the data showed, respondents from a consulting background seem to have navigated more to the business philosophy variable.

Most of the project sponsors selected technological project as the best description of CRM. On the other hand, more vendors opted for the software description of CRM. Overall, the collated questionnaire data shows that CRM supersedes the tactic, software or technological tag and is more of a business philosophy that does embody all of these other elements.

**Question 4:** What would you say is the core role of CRM in an organization?

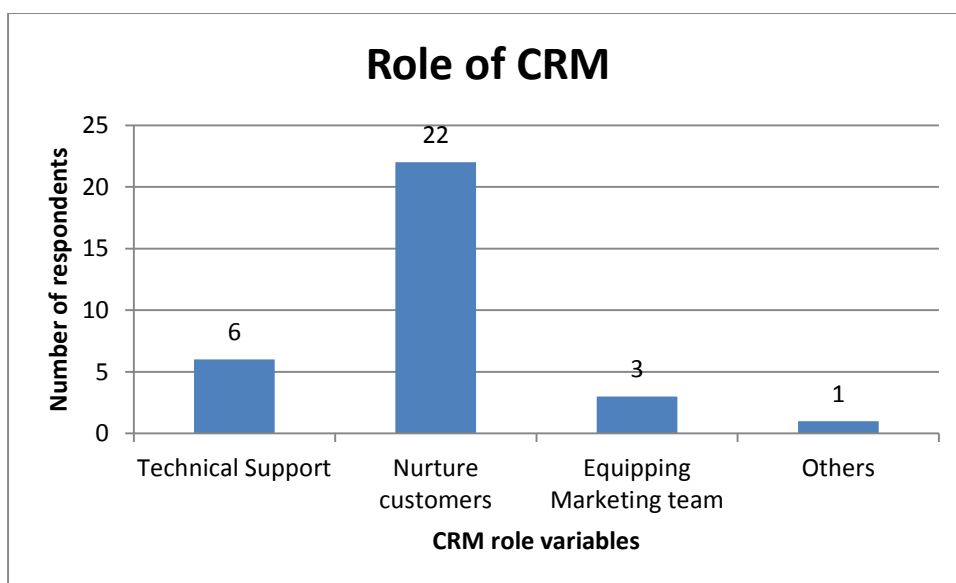
As the fourth question, is aimed at discovering the importance and functionality of CRM in any given organisation. A table below indicating the variables and how many respondents chose each respective indicator would be highlighted below.



**Table 7: Role of CRM**

Technical Support	Nurture Customers	Equipping Marketing team	Other
6	22	3	1

A majority of respondents, precisely 22 out of 32 believed the role of CRM is centred on nurturing and enhancing customer relationships. This appears to be the majority of the responses.



**Figure 2: Role of CRM**

This chart shows a clear majority of the respondents, 22 to be exact, believe the role of CRM is in nurturing customers. It is a convincing 73% of the entire questionnaire respondents, that chose nurturing customers over the second highest, which is technical support. It clearly indicates that the questionnaire respondents believe the customer-centric role of CRM. This data tallies with the previous chart, to establish the point that CRM is more than software or technological platform but a business philosophy that is geared at nurturing customer relationships.

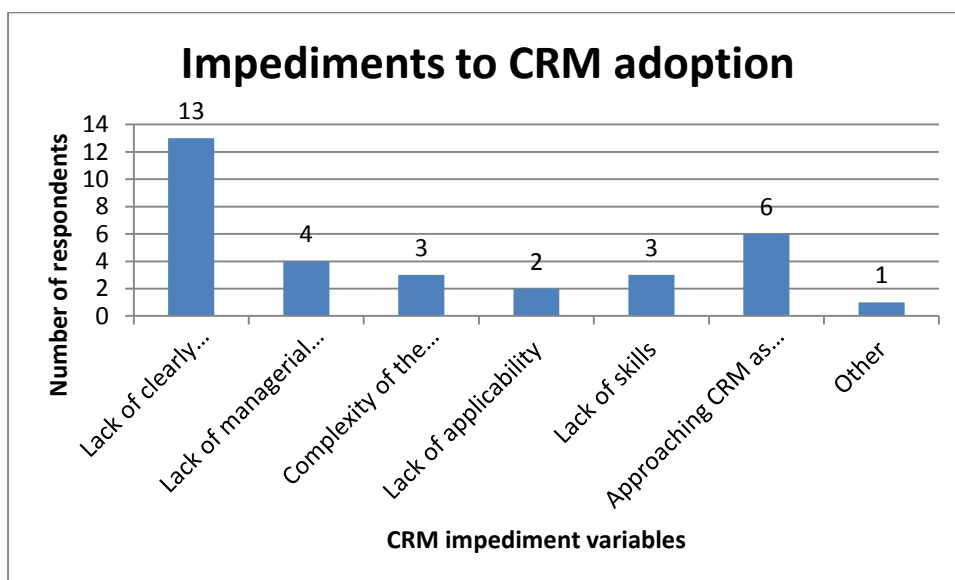
**Question 5:** What would you say are the likely challenges which could impede the adoption of CRM?

This question presents an opportunity for respondents to select among the list of variables, which is not suitable regarding the biggest challenge that affects the adoption of CRM. The table below indicates the responses from the respondents

**Table 8: Impediments to CRM adoption**

Lack of clearly defined goals	Lack of managerial support	Complexity of the CRM	Lack of applicability	Lack of skills	Approaching CRM as a technology only solution	Other
13	4	3	2	3	6	1

Based on the above table it is quite clear that lack of a clearly defined goals appears to be the highest chosen variable that expresses the impediments to CRM adoption.



**Figure 3: Impediments to CRM adoption**

In terms of the barriers or impediments to CRM adoption, a host of variables were tested and lack of a clearly defined goal, seems to attract about thirteen respondents. Approaching CRM as a technology only tool seems to be second on the rank. This clearly shows approximately 41% of the total respondents are convinced that CRM adoption is very likely to fail if organizations fail to clearly define their goals from the onset.

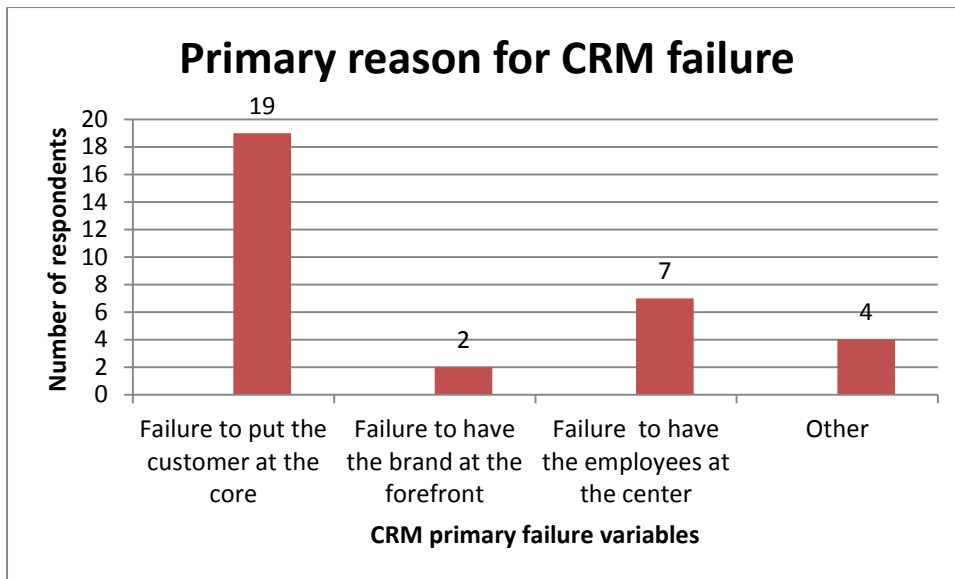
**Question 6:** What then would you say is the primary reason for CRM failure?

This section does narrow down the factors that contribute to CRM failure to one, the core reason why CRM projects fail.

**Table 9: Primary reason for CRM failure**

<b>Failure to put the customer at the core</b>	<b>Failure to have the brand at the forefront</b>	<b>Failure to have the employees at the centre of the implementation</b>	<b>Other</b>
19	2	7	4

It clearly indicates that more than half of the respondents believe that the inability of a company to have the customer's preferences and interest at the centre of a CRM implementation has a higher possibility to lead to failure.



**Figure 4: Primary reason for CRM failure**

The primary or main reason for CRM failure is an intriguing element of this research, as the failure to put the customer at the core appears to be the highest on the above chart. About 19 of the respondents believe the inability of companies to embed the perception and interests of the customer to her CRM strategy, is a massive impediment.

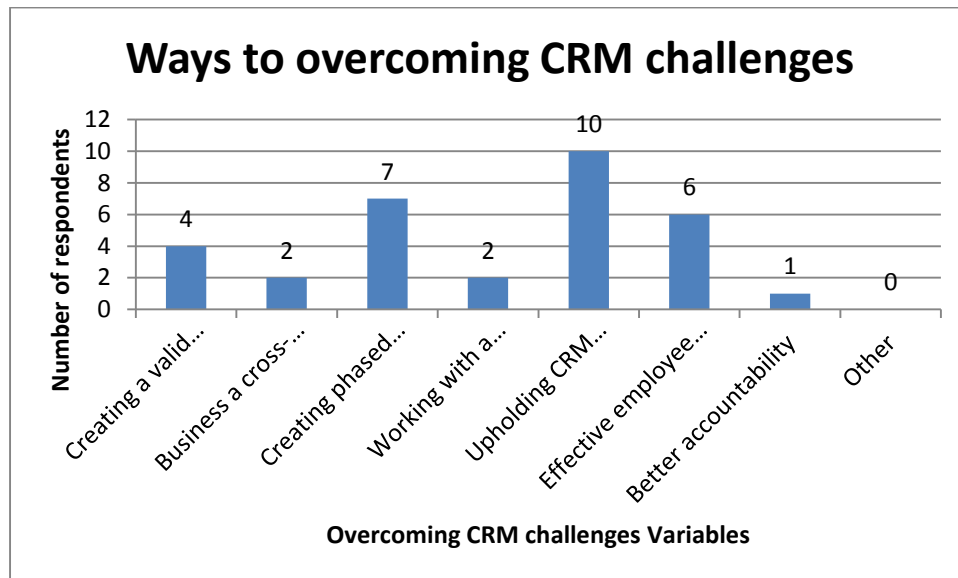
**Question 7:** How best could these challenges be overcome for a successful CRM implementation?

This project is also interested in seeking for ways to overcome CRM implementation and adoption challenges. It is in this vain that the responses would be expressed in a tabular format, to check the ranking of the variables.

**Table 10: Ways to overcoming CRM challenges**

Creating a valid business case.	Building a cross-functional team	Creating a phased implementation plan	Working with a vendor consultant	Upholding CRM notion for business change	Effective employee engagement	Better Accountability	Other
4	2	7	2	10	6	1	0

The above variables shows how the CRM challenges could be overcome and 'upholding CRM notion for business change,' seems to have the highest number of respondents, followed by a phased CRM implementation and employee engagement.



**Figure 5: Ways to overcoming CRM challenges**

Identifying and understanding the challenges and barriers to CRM adoption and implementation is crucial for this research but also finding ways to overcome these challenges are also an important aspect. 10 out of the 32 respondents, do believe that upholding the CRM notion for business change would help companies overcome the challenges of CRM implementation. Based on the chart, 7 of the 32 respondents, which is about 22% opted for a phased implementation of CRM projects, as a way of overcoming the barriers or challenges.

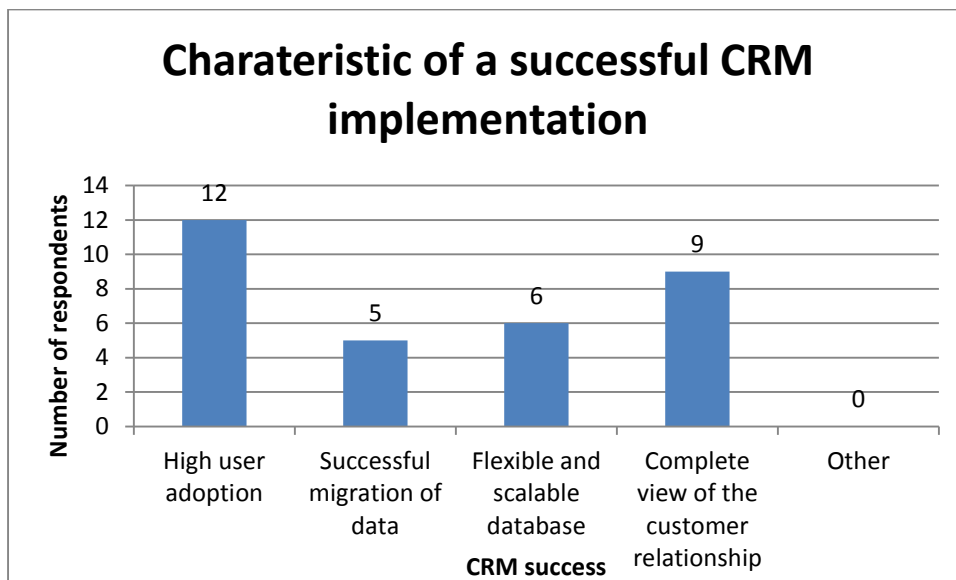
**Question 8:** What does a successful CRM implementation look like?

In a bid to having a clearer picture of CRM implementation, the above question was posed to respondents. It would now be imperative to present a table with the responses.

**Table 11: Characteristic of successful CRM implementation**

High user adoption	Successful migration of data	Flexible and scalable database	Complete view of the customer relationship	Other
12	5	6	9	0

The above table indicates that a very high user adoption indicates what a successful implementation looks like.



**Figure 6: Characteristic of a successful CRM implementation**

The above chat presents the data from the respondents with regards to how they characterise a successful CRM implementation. 12 out of the 32 respondents, approximately 37.5%, believe that a higher user adoption is an indication of how successful a CRM project is. Closely followed to that, is the complete view of the customer relationship. Other variables like flexible and scalable database and successful migration of data both have 6 and 5 responses each.

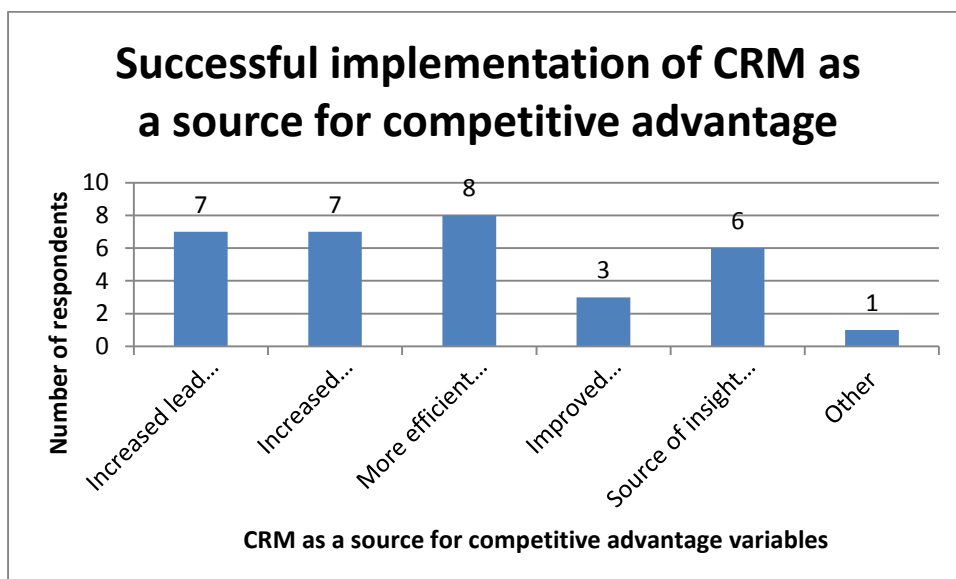
**Question 9:** How does a successful CRM application serve as a source for competitive advantage?

This is the last question on the survey as the researcher aimed at gathering data that indicates how successful CRM implementation serves as a source for competitive advantage.

**Table 12: CRM implementation as a source for competitive advantage**

Increased lead generation	Increased account retention	More efficient business processes	Improved management Information reporting	Source of insight for sales.	Other
7	7	8	3	6	1

The above table indicates that the implementation and adoption of CRM could help a company have more competitive advantage.



**Figure 7: Successful implementation of CRM as a source for competitive advantage**

This appears to be the core topic of this research, as the above graph shows how there is almost an even spread among respondents around the top four variables. More efficient business processes, has a slightly higher frequency when compared to other variables. More efficient business processes appear to be the main source of

completive advantage. Increased lead generation and account retention had a joint score of 7 responses each. This clearly shows CRM has more attributes that could make it a great source for competitive advantage.

## 4.2 QUALITATIVE PRESENTATION AND ANALYSIS OF DATA FROM INTERVIEWS

On this aspect, data was collected through interviews, interviewing three respondents. This was done with an aim of digging deeper into the research area, to find out how the findings address the research questions. Due to the demand from the respondents for limited anonymity, the author will label the respondents with: Respondent A, B and C and give a bit of information regarding their profile. After the presentation of the qualitative data a thematic analytical method will be adopted.

**Interview Question One:** What reasons do you think leads to CRM failure?

**Respondent A:** This respondent is a great CRM practitioner and believes a host of factors could lead to CRM failure. The three major reasons the respondent believes CRM projects fail are: poor organizational culture, lack of clear objectives and the wrong choice of the platform. He believes most companies fail in their CRM implementation and adoption because they are too focused on the features of the platform and less on their corporate culture and customer-centric philosophies.

**Role:** Salesforce.com CRM Project manager/Implementation consultant. The interviewee helps in facilitating the implementation of Salesforce CRM projects for clients in investment banking and finance.

**Relationship with CRM:** CRM implementation consulting with 10 year experience.

**Respondent B:** This interviewee believes there a lot of reasons CRM projects fail but the greatest of them all is lack of engagement with the employees. She is convinced that there has to be a huge employee buy-in to any CRM implementation. She also adds that implementation is only successful when there is a high user adoption. People



are not too receptive to change including new CRM platforms. To this effect, the interviewee believes an uninformed and unengaged workforce is a recipe to CRM failure.

**Role:** CRM Analyst for a Telecommunications company. The respondent is responsible in evaluating the effectiveness of the Zendesk CRM platform for the company.

**Relationship to CRM:** A CRM professional with over five year's analytical experience.

**Respondent C:** The last respondent also noted some of the points mentioned by the other interviewees but added that the failure of CRM implementation should be viewed from an outside-in and inside-out approach. She said companies that successfully fail to implement CRM programs, have not covered the two dimensions. She said the outside-in approach, involves failing to listen and incorporate the needs and interests of her customers to her CRM pursuits. Also CRM failure in this respect comes about by failing to have external consultants or experts, spend much time within the company to train and mentor employees. Inside-out accounts for failing to design and communicate a clear objective to a CRM vendor.

**Role:** CRM Product manager, responsible for providing a customer-centred CRM product.

**Relationship to CRM:** A CRM professional with over seven years' experience.

**Interview question Two:** In your opinion, what reasons do you think make CRM implementations successful?

**Respondent A:** This respondent says CRM projects are successful when management treat it as a marathon and not a sprint. He says the core reasons for CRM success is that companies first build a convincing business case, on the backdrop of a clearly define goals. He says when companies clearly define their reasons for adopting a CRM program they are on a good start.

**Respondent B:** The interviewee is convinced that CRM succeeds with effective communications with the vendor and properly managing expectations. She believes

effective communication between the company and vendors on one hand and the company and her employees are crucial.

**Respondent C:** The final respondent thinks that the opposite of the reasons that make CRM fail are the very ones that makes it succeed. He believes effective budgeting and a functional ownership of the project is essential.

**Interview question 3:** How has a company gained significant market share or competitive advantage as a result of a successfully implemented and adopted CRM application?

**Respondent A:** On this final question, the respondent believes an effective implementation and adoption of CRM projects, helps a company gain competitive advantage by helping a company connect and collaborate with her customers.

**Respondent B:** This interviewee is highly convinced that successful CRM implementation does serve as competitive advantage for companies as they are able to retain and attract profitable customers. She cites how CRM helps deliver luxury and accessible customer service with the case of how the Zendesk CRM platform has helped many companies empower customers with a great self-service web platform.

**Respondent C:** The final respondent believes successful CRM implementation does serve as a source for competitive advantage because it helps reduce customer complaint tickets as issues are dealt with quickly. This at the long run makes a company more competitive as employees are motivated and customers are happy to remain loyal. He believes a good example is with the fresh desk CRM platform adopted by many companies that has drastically helped to reduce tickets and keep customer service employees happy.

#### **4.2.1 Qualitative data analysis of the Interviews**

The thematic data analytical method would be adopted in this section. Burnard et al (2006) view this form of data analysis as an inductive process that is geared at analysing transcripts, identifying themes and collating the themes. It should be pointed out that the transcripts have been analysed and themes identified, which has been expressed in the earlier section. This section would focus on collating the themes that were identified during the interview process.

**Table 13: Data themes generated from the interviews**

Research area	Themes
Reasons CRM fails	Customer-centricity deficiencies, lack of clarified goals, Employee disengagement, Uninformed CRM vendor choice and Unreceptive to change
Reasons CRM succeed	Gradual Implementation, business case, project ownership, knowledge management, effective budgeting and communication.
CRM as a source for competitive advantage	Customer insight, effective collaboration, prompt communication, customer advocates, business intelligence, customer loyalty, customer delight and employee engagement, return on investment, low staff turnover and low customer churn

#### **4.3 USING THE FINDINGS AND DATA ANALYSIS TO ANSWER THE RESEARCH QUESTIONS**

This section would be purely focused on adopting the findings from the quantitative and qualitative data to see how best they answer the research questions and meet the research objectives.

**Research Question one:** What role do CRM applications play in organizations?

A revisit of the quantitative data presentation and analysis does highlight the roles of CRM. To be more precise the fourth question on the questionnaire indicated that about 22 out of the 32 respondents believed that the most important role of CRM is in nurturing customers. This is about 69% of the entire respondents favouring nurturing customers as the main role of CRM. In addition, 6 respondents believed that technical

support is an important role of CRM while equipping the marketing team accounted for 3 responses. The interview process presented a wide array of CRM roles which comprises of: collaboration with customer, informed business decisions, customer insight, brand affinity and knowledge transfer. It is therefore important to state that a majority of the interview responses centres on the core theme of '**nurturing customers**' as the main role of CRM.

#### **Research Question two:** What are the causes of CRM failures?

Two questions on the questionnaire were asked with an aim in answering this research question. The first question looked at the impediments to CRM adoption which saw lack of clearly defined goals as the variable with the most responses. About 13 out of the 32 respondents chose that option. The second impediment with the most responses was approaching CRM as a technology only solution. This helped to identify the various impediments or barriers to CRM adoption which answered this research question.

The other question on the survey that sought out to address this research question was the primary reason for CRM failure. It is to be said that 19 out of the 32 respondents believe the primary reason CRM projects fail is due to the fact that companies fail to put the customer at the core.

Based on the interviews carried out, a plethora of factors were identified for CRM failures. They comprise of lack of employee engagement, lack of customer centricity and dysfunctional organisational structure. Most of the interviewees emphasized on lack of customer centricity or a customer-laden culture as a big reason why CRM projects fail. This does tie in with the questionnaire findings that had more responses for the 'failure to put the customer at the centre.'

#### **Research Question three:** What are the factors that are responsible for the successful implementation of CRM projects?

A question on the survey was designed to address this research question. In the questionnaire, respondents were given an opportunity to select the appropriate way in overcoming CRM challenges. From the data generated from the questionnaire, about

10 out of the 32 respondents believed 'upholding CRM notion for business change,' was the highest success factor.

Looking closely at the interview data, respondents cite factors such as a strong business case, effective budgeting and project ownership as some of the reasons behind successful CRM implementation. More importantly, the interviewees stressed communication as an integral or pivotal reason for CRM success.

**Research Question Four:** How can a successfully completed CRM project serve as a source of competitive advantage for companies within the telecom, government and financial sectors?

This research is premised on this question, as this dissertation topic goes thus: 'Successful implementation of CRM projects as a source for gaining competitive advantage.'

Firstly, the last question on the questionnaire, displays that a successful implementation of CRM project does serve as a source for gaining competitive advantage. There is almost an even spread of respondents across the different variables. About 8 of the 32 respondents believe that successful CRM implementation serves a source of competitive advantage like more efficient business processes.

Nonetheless, to get a more substantial analysis to the core research question and topic, there would be the adoption of the Pearson's correlation technique. Saunders and Lewis (2012) conceive of this analytical method as a way of finding a relationship between a minimum of two continuous variables. The value of this type of correlation is found between 0.00 (no correlation) and 1.00 (perfect correlation).

In this context, the aim is to statistically determine the relationship or correlation between successful completion of CRM projects and gaining competitive advantage. Based on the data generated from the survey and the interviews, two variables have been identified. The first variable X would be the indicators of the successful completion of CRM projects. The second variable is Y and looks at the features of competitive advantage. Scores have been collated based on the number of

respondents that have chosen these indicators on the questionnaire or mentioned them during the interview.

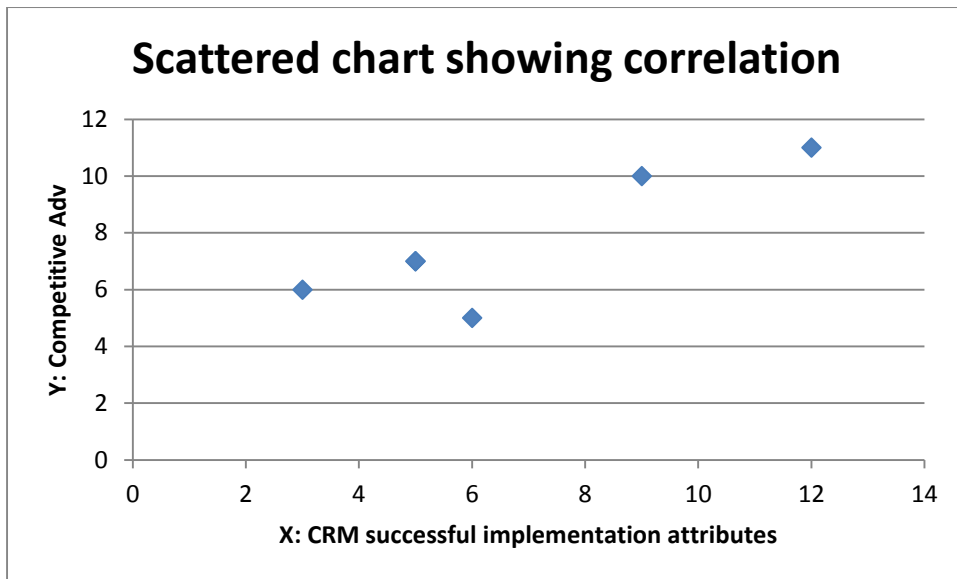
**Table 14: Variables for Pearson’s correlation analysis**

<b>X: Characteristics of successful CRM implementation (cause)</b>	<b>Y: Features of competitive advantage (effect)</b>
Employee engagement (5)	Low staff Turnover (7)
Complete view of the customer relationship (9)	Customer Retention and low churn rate (10)
High User adoption (12)	Return on investment (11)
Flexible and Scalable database (6)	Productive marketing campaigns (5)
Successful migration of data (5)	Better customer insight and enables customer advocacy. (7)
Clean and rich data (3)	Improved lead conversion and sales (6)

After calculating the Pearson’s correlation, using the Microsoft excel data analysis tool, the relationship between X and Y=+ 0.873038.

There is therefore a positive correlation between successful completion of CRM projects and gaining competitive advantage, Based on this given research, it is statistically correct to state that when a company improves her completion rate of CRM projects, it is very likely going to witness an increase in her competitive edge or advantage. The variables generated for analysis were adopted from the questionnaire responses and the interviews. A coding method was utilised to derive patterns, terms and frequency.

It would therefore be essential to have a look at the scatter chart displaying the correlation between successful CRM implementation (X) and gaining competitive advantage (Y).



**Figure 8: Scattered chart for correlation analysis**

The above chart indicates the positive correlation between variables X (successful CRM implementation and Y (gaining complete advantage). A perfect correlation of '1' shows a completely straight line, while the above is not perfectly straight but somewhat in one direction.

#### 4.4 RESEARCH CRM CUSTOMER-DRIVEN FRAMEWORK

It will now be important to draw up a framework that is derived from this research. This simple framework is as a result of the findings that have been arrived at from a quantitative and qualitative process.



**Figure 9: The customer-driven framework of CRM** (Source: Researcher's adoption)

Based on the research, it shows CRM implementation has to come from a customer-centric culture. The customer's needs, expectation and interest are the first step to the implementation of CRM. This framework is very similar to the multi-layered model of CRM strategy implementation, by Finnegan and Currie (2010). It starts with the psychological layer, which is the softer elements and is in tandem with the customer-driven framework above, which starts with the customer's needs and corporate culture. The multi-layered model of CRM strategy implementation ends with the technological



layer which also correlates with the above framework that focuses on the actual implementation of CRM. It simply shows the customers need and desires are the driving force behind CRM projects.

## 5.0 CONCLUSION AND RECOMMENDATION

### 5.1 REMINDER OF THE RESEARCH CONTEXT

It is very important to briefly look into the research context of this project. This research has been geared towards ascertaining how the successful implementation of CRM projects has been a source of competitive advantage for businesses. This research from the onset was set out to achieve these objectives:

- To evaluate the essence of CRM for businesses within the government, Telecom and financial sectors
- To discover the reasons behind the high failure rates of CRM projects
- To ascertain the factors that are responsible for successful CRM completion
- To analyse how successfully completed CRM projects could serve as a source of competitive advantage.

The core sectors for this research were the financial institutions, government bodies and telecommunication firms. Irrespective of the three sectors at focus, the findings generated seems to be applicable in other industries as they all involve interaction with customers. It is also important to restate that a total of 30 respondents completed the questionnaires and 3 persons were interviewed. This presented both qualitative and quantitative data that called for a mixed method of research- utilising a thematic qualitative analytical tool. In terms of the quantitative aspect, charts in the form of bar charts and the Pearson's correlation co-efficient were utilised. Having recaptured the background to this research, it would now be imperative to look at the conclusion and recommendations in detail.

### 5.2 CONCLUSION

Findings from this research indicated that there was a strong correlation between the successful completion of CRM projects and gaining competitive advantage. The set project objectives were individually met.

The first project objective was looking at the important role CRM projects play in government, financial and telecommunication institutions. Findings indicated that CRM plays an important role in organizations from a wide array of sectors. The most important function of CRM is in nurturing customers. This was backed up by majority

of the respondents from the questionnaire. The interviewees also cited this as they expressed it with phrases like: 'fostering good relationships with customer' 'endearing customer to brands' and 'breeding collaboration.' It is obvious that these findings are not just valid in the three primary sectors in focus but applicable to any industry that involves relationship with customers.

The second objective looked into discovering the factors that lead to CRM failure. The findings from the research indicated that CRM projects fail from a host of reasons which comprises of a lack of clarified goals, employee disengagement, unreceptive to change and a host of few others. Among the reasons, the most important reason discovered during the research is failure to put the customer at the centre (customer centricity). This appears to be the biggest reason why CRM projects fail, irrespective of the sectors. From the interview and questionnaire findings, it is apparent that having the interest of the customer at the centre or core is paramount for CRM success.

While this project sought out to find the reasons why CRM projects fail, it also explored through the aid of interviews and questionnaires, the reasons why CRM projects succeed consists of a phased implementation program, effective employee engagement, effective budgeting, project ownership and a host of others. Amongst all these, based on the findings, the biggest reason CRM projects tend to succeed is because of the upholding of business case for change (solid business justification for an adoption of a CRM project). The findings also clearly shows that attaining CRM implementation success is feasible as long as there is a good business journey map and justification.

As stated earlier, the ultimate objective was to ascertain how successfully completion of CRM projects helps a company gain competitive advantage. Using the Pearson's correlation coefficient analysis, it was clear that there was a positive relationship between successful CRM projects and gaining competitive advantage. Successful CRM implementation indicators like employee engagement contribute to competitive advantage feature like: low staff turnover. It seems to be more of a cause and effect relationship, as a successful CRM implementation appears to be a cause and competitive advantage an effect. It therefore goes a long way to show that successfully implementing a CRM project would help companies gain that extra competitive edge over her rivals.

### 5.3 RECOMMENDATIONS

This researcher would therefore forward recommendations on how successful CRM projects could serve as a source of competitive advantage for companies.

Firstly, based on the research, it is quite clear that companies seeking to implement any CRM project should make efforts to listen to the feedback, reviews, interactions and complaints of her customers. Collating all of these and generating actionable insights would help to design a strong CRM business case that is centred on the customer.

Secondly, it was also noted amongst respondents, that there is the need for companies, to fully seek the views of the front line staff: in call centres, retail outlets and web chat portal. They highlighted that some companies fail to comprehensively involve the needs and opinions of these staff. This would help in building employee engagement from a bottom-up approach, as they feel to be part of the team.

Thirdly, based on the discussions with the interviewees, it is quite imperative for companies to seek the opinion of a neutral CRM consultant, that could help to critically look at the business needs of the organization and recommend the best CRM platform.

Fourthly, with the popularity of cloud based CRM platforms, like Salesforce.com, it is quite important for companies to incisively and critically assess their needs, to ascertain if going for a cheaper and easily implementable cloud based system is cheaper than going for an enterprise platform that requires expensive servers.

Finally, this research has indicated the underlying importance of CRM and its essence to the competitive edge of businesses in today's business environment. The customer is pivotal to any CRM and business success, so a phased implementation that revolves around collaboration with the customer is important. Businesses have to continuously communicate and collaborate with the customer, in a bid to achieving the CRM and business success.

## **5.4 AREA FOR FURTHER RESEARCH**

This research has been able to establish the factors that contribute to CRM failure and success; also ascertained that the successful implementation of CRM projects would help a company gain competitive advantage.

It would be helpful, if further research looks deeper into the area of customer-centricity and CRM. In terms of how companies gain customer centricity and how that impacts on her CRM success. Simply looking at how customer-centricity impacts upon CRM and vice versa. This is because the concept of customer-centricity has been misinterpreted in some quarters, so having an in-depth analysis into its elements and testing how it moderately or strongly relates to CRM would be beneficial to businesses, business students and researchers.

## Appendix A

A company of the questionnaire and interview

### Questionnaire

**Name:**

**Occupation:**

Please tick the appropriate option or options where applicable:

**1) What is your relationship with CRM?**

- A) Sponsor
- B) User
- C) Consultant
- D) Vendor
- E) Other

**2) Have you used any CRM system in your organisation and if 'yes' for how long?**

- A) Less than 1 year
- B) 1-3 years
- C) Over 3 years
- D) I have never used one

**3) What best describes CRM?**

- A) A software project
- B) A business philosophy and strategy
- C) Tactic
- D) A technological tool
- D) Other

**4) What would you say is the core role of CRM in an organization?**

- A) Providing adequate technical support to customers
- B) Nurture and enhance customer relationships
- C) Equipping the marketing team to manage campaigns effectively
- D) Other

**5) What would you say are the likely challenges which could impede the adoption of CRM?**

- A) Lack of a clearly defined goals and requirements gathering
- B) Lack of managerial support
- C) Complexity of the CRM system
- C) Lack of applicability in your particular organisation
- D) Lack of skills to support CRM systems
- F) Approaching CRM as a technology only solution
- E) Other

**6) What then would you say is the primary reason for CRM failure?**

- A) Failure to put the customer at the core of the CRM strategy through customer survey
- B) Failure to have the brand at the core of the company's CRM strategy
- C) Failure to have employees at the centre of the implementation
- D) Other

**7) How best could these challenges be overcome for a successful CRM implementation?**

- A) By creating a valid business case and defining measurable goals
- B) Building a cross-functional team representing all departments and interest
- C) Creating a phased implementation plan, with smaller implementation phases.
- D) Working with a Vendor consultant to overcome integration and complexity woes
- E) Upholding the notion that CRM is a business process change supported by technology
- F) Effective employee and stakeholder engagement

G) More accountability from management

H) Other

**8) What does a successful CRM implementation look like?**

A) High User adoption

B) Successful migration of data and integration

C) Flexible and Scalable database

D) A complete view of customer relationship in one single application

E) Other

**9) How does a successful CRM application serve as a source for competitive advantage?**

A) Increased lead generation

B) Increasing account retention and service delivery

C) More efficient business processes

D) Improved management information reporting

E) Source of insights for sales, marketing and customer support

F) Other

**Semi Structured interview:**

1) What reasons do you think lead to CRM failure?

2) In your opinion, what reasons do you think make CRM implementations successful?

3) How has a company gained significant market share or competitive advantage as a result of a successfully implemented and adopted CRM application?



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