
CUSTOMER RELATIONSHIP MANAGEMENT STRATEGY: THE
FACTORS TOWARDS A SUCCESS IMPLEMENTATION

CASE STUDY

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Biographic Note

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Resumo

Existe na literatura um sentimento comum de insucesso das implementações de estratégias *Customer Relationship Management (CRM)* nas diferentes empresas. A literatura também apresenta três fatores principais que influenciam a implementação de uma estratégia CRM: a) a necessidade de existir uma cultura focada no cliente com uma abordagem multifuncional no processo e construção da estratégia, b) um comprometimento total da gestão de topo e dos restantes trabalhadores da empresa na implementação e utilização da estratégia e, c) a tecnologia adotada de suporte à estratégia deve ajustar-se aos objetivos da empresa.

Este estudo de caso pretende estudar a implementação de uma estratégia *Customer Relationship Management* numa empresa da indústria da cortiça para compreender qual o impacto destes três fatores no processo de implementação.

O que se conclui é que as empresas devem garantir que a estratégia é comunicada a todas as áreas envolvidas no processo. Uma estratégia bem percebida irá reforçar a cultura orientada para o cliente, fortalecer o comprometimento e participação dos trabalhadores e permitir a correta customização da ferramenta tecnológica de suporte à estratégia.

As empresas que compreendem os fatores críticos de sucesso da implementação de uma estratégia CRM, estão a aumentar a probabilidade de sucesso no final. E, estarão mais perto do objetivo da estratégia CRM de melhorar as relações com os seus clientes, conseguindo responder de forma rápida e correta às suas necessidades.

Palavras-chave: Customer Relationship Management (CRM); comunicação; estratégia; comprometimento; adaptação; cultura

Abstract

Several studies reflect the common feeling of failure in the implementation of Customer Relationship Management (CRM) strategies in different firms. Literature also pointed out three major factors that influence a CRM strategy implementation: a) the need of a customer-based culture with a cross-functional approach in process analysis and construction, b) the full commitment of the top management and the workers in the systems' implementation and usage and, c) the technology adopted needs to fit to the firm's objective.

This case study aims to study an implementation of a Customer Relationship Management strategy in a company of the cork industry to understand what the impact of the three factors during the process of implementation was/is.

What can be concluded is that companies should guarantee that the strategy is communicated through all areas that are implicated into the process. A well perceived strategy will consolidate a culture customer oriented, reinforce the commitment and participation of all employees and enable a correct customization of the technological tool.

Companies that understand the critical success factors of a CRM strategy implementation will increase the probability of success in the end. And will get closer to the final CRM strategy objective that is improve the relationship with the customers with a fast and correct response to their needs.

Key words: Customer Relationship Management (CRM); communication; strategy; commitment; adaptation; culture

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1 Introduction

The business world is becoming more competitive over the years. Nowadays, regardless of the industry in which they operate, all businesses face an increasingly fierce competition, with full access to its customers (Foss *et al.*, 2008). Customers have access to an infinite number of offers from a lot of players, that offer the same product at different prices, or similar products with different characteristics, or customized products, etc., the list of options is endless. This context explains why business behaviour is changing. For the past years the business world changed its focus on product to be focused on customers.

Companies are focused on realizing what their customers' needs and desires are and adapting their processes to responding with the right products at the right time to those requirements. Even more than respond to current necessities, companies are also working, more and more, to anticipate future needs and thus ensure that they are ahead of the competition.

With Customer Relationship Management (CRM) strategies companies seek to align their culture with the goal of satisfying and retaining their customers (Payne and Frow, 2006), boosting their capacity to respond to their needs. However, CRM strategies usually require major changes in several areas of the business. These strategies will be successful if companies ensure that culture and processes are customer focused, that people are committed to the goal of the strategy and that communication is clearly and easily used by those who need it.

Companies that decide to start a process of implementing a CRM strategy must be aware that often involves a structural change of business, requiring, therefore, a strong interconnection of the main factors that contribute to its success.

1.1 Objective and Study Relevance

Given the low success rate of CRM strategies implementations in the real world and the difficulties that companies face during implementations (Finnegan and Currie, 2010), becomes fundamental to study the relevant factors that contribute to the success of CRM strategy implementation.

The present study aims to explore influence of three most important factors, pointed by literature as fundamental to the success of a CRM strategy implementation: the company's culture and processes, the people commitment and involvement and the technology adopted to enable the share and storage of customer information.

Until now, numerous studies were presented that tried to find a path or a plan to a CRM strategy implementation that won't lead to its failure, although there is not one single formula that can be applied to each case. This case study hopes to discover the influence of the factors: culture and processes, people and technology, have in a real project of implementing the CRM strategy that is under development, to understand if the project is moving towards to its success or failure.

1.2 Study Structure

The study has 4 chapters beyond introduction. Chapter 2 presents the literature review, where the objective is to contextualize the study and identify the main factors that influence the success of a CRM strategy implementation. Chapter 3 presents the study objectives and the methodology adopted for the data collection and its subsequent analysis. Chapter 4 analyses and discusses the data obtained. And, finally, at chapter 5 the conclusions are drawn along with the limitations of the study and are presented suggestions for future areas of research.

2 Literature Review

2.1 Introduction

In this work section, the purpose is to understand what a Customer Relationship Management strategy is and what its implementation implies in a company, based on previous studies on this matter. By the end of literature review the influence of the relevant factors – culture and processes customer-oriented; the commitment of employees and top management, and the information system tools, have on the success of a CRM strategy implementation will be clear and identified.

The definition of CRM strategy and the identification of factors will be critical to the chapter 3 - the methodology.

In the case study, the objective is to study the importance of a CRM strategy in the business and how the factors influenced/are influencing the success or failure of a CRM strategy implementation in a Portuguese company in the cork industry. The review of the literature will provide the guidelines for the elaboration of the interviews that will lead to the answer of this case study questions.

2.2 Customer Relationship Management (CRM)

To understand the influencers of CRM strategy implementation, it is fundamental to understand what a CRM strategy and its relevance in the current business world is. What is CRM and why do companies feel the need to implement it?

The current business environment that companies are facing is very competitive and companies need to clearly understand the needs of their customers and offer products and/or services according to those needs. The continuity of a business largely depends on its customers. And, it is not related to the type of business because every business faces nowadays a competitive

environment where other companies try to provide the same customers. The challenge now is to offer a set of products and services that provide greater value than those offered by the competition (Cambra-Fierro *et al.*, 2017; Garrido-Moreno *et al.*, 2014).

Companies can only guarantee their competitive advantage if they can adapt and change their business overview to the variations in the market and/or environment where they operate (Chang, 2007). Having the ability of selling according to customers' individual preferences and needs and market variations, will increase customer retention and, consequently, business profitability (Yim *et al.*, 2004).

The ability of matching efficiently customers' needs will also to ensure a lasting and future relationship with the customers (Chang, 2007). So, the focus of businesses should be the development and management of products and services according to the customers' specifications (Yim *et al.*, 2004).

There are multiple definitions for CRM and CRM can be apprehend differently by each company, so it is difficult to have a single definition (Triznova *et al.*, 2015).

Ahearne *et al.* (2012), identified 45 different definitions, some of the authors define CRM as a strategy, others as a technology, some as a process, among others. Although the high number of definitions of CRM, most authors share the definition of CRM as a strategy that implies processes, people and technology.

One of the definitions of CRM is that it must be considered as a strategy that aggregates different areas and tools as processes, people and technology, within an organisational structure and culture, that will maintain and retain long-term relationships with customers (Mendoza *et al.*, 2006).

Payne and Frow (2006) consider that a CRM strategy is a way of creating value for the customer and for the company based in a

relationship where they share information, that is used and managed by the company in a technological way that allows it to be spread throughout areas and processes responsible for strengthening this relationship.

So, CRM should be considered as a holistic strategy that aims to create dual-value, engaging the ability of the business to survive in the current highly competitive business world (Bhat and Darzi, 2018).

For this work the definition of CRM from Boulding *et al.* (2005) is considered the most complete one, because it combines all the definitions mentioned above: “CRM relates to strategy, the management of dual creation of value, the intelligent use of data and technology, the acquisition of customer knowledge and the diffusion of this knowledge to the appropriate stakeholders, the development of appropriate (long-term) relationships with specific customers and/or customer groups, and the integration of processes across the many areas of the firm and across the network of firms that collaborate to generate customer value”.

So, it can be considered as the main purpose of CRM the increase of customer retention that contribute to higher profitability, engaging the relationship between those customers and the company (Payne and Frow, 2006). Retention and loyalty are key features for higher profitability, customers that are loyal to the company, contribute to better performance, i.e. have the right product, at the right time and place at the right price (Mendoza *et al.*, 2006).

To guarantee the maximum efficiency and effectiveness of companies' customer relationships, companies must be able to identify group of customers, targeting the customers that are more profitable to the business (relationship customers) than others (transactional customers) and distinguish them at the time of offering products and services (Bull, 2003).

Therefore, CRM is viewed as a fundamental tool to help businesses in differentiate customers and increase organisational profitability. It will lead to higher customer satisfaction and retention, due to an effective customer management (Bull, 2003) and to an efficient delivery of value propositions to each one of the customers (Payne and Frow, 2006).

CRM enable companies to manage the communication regarding customer experience and needs, enabling companies to respond with products and offers that fit customers' expectations. When the customer perceives the add value of a company that implements CRM strategy, he/she will become a satisfied and loyal customer, i.e. the CRM strategy implementation can be measured by the customer satisfaction and loyalty rates (Cambra-Fierro *et al.*, 2017).

Better efficiency and effectiveness in offering products and services, leads companies to financial gain, which in the end is what motivates the implementation of a CRM strategy (increase on market share, increase in sales and profitability, among other indicators), (Ahearne *et al.*, 2012; Sen and Sinha, 2011).

The Boulding *et al.* (2005) definition of Customer Relationship Management (CRM) and the benefits that it has on business profitability explains the increasing CRM tools and strategies since the late 1990's (Macmillan, 2008). The idea that CRM is the only way to survive in this environment became a trend (Mendoza *et al.*, 2006).

The industry of consultant companies and informatic tools that help companies to implement CRM strategy has been growing for the past 10 years, presented by Gartner stated by Schaeffer (2017), it was expected that by the end of 2017 the CRM industry would reach \$36.5 billion. It is a fast and strong growth when compared with 2007, where the CRM industry valued \$8.1 billion, 4 times more in 10 years.

At the same time, in the academic field, the importance of studies regarding CRM implementation strategies is increasing over the last years (Elmubasher, 2017).

It is undeniable the high importance that CRM strategies and, the technological tools that are inherent to it, have in the business world.

However, there are studies that conclude that not always the implementation of the CRM strategy in a company leads to success and to the increase of its efficiency and effectiveness in relations with its customers. And companies find the CRM implementation a very hard process to complete and in the end, understand the benefits of it. The statistics shown that only 25% of CRM projects implementation had create value to the company and the others 75% of the companies were disappointed with the results (Raman *et al.*, 2006; Steel *et al.*, 2013; Foss *et al.*, 2008; Finnegan and Currie, 2010). Additionally, the feeling among companies is that a CRM implementation is a big investment with a reduced payback for the business (Varajão and Cruz-Cunha, 2016).

Understand the factors that contribute to high rate of disappointment with CRM strategies results is fundamental.

2.3 The determinants of success

Considering the definition of CRM, this section explains the relevance of a customer-oriented culture and processes, employees and top management commitment and the technology put in place in the success or failure of the CRM strategy implementation.

A lot of studies were developed regarding the success and/or unsuccess of CRM strategies implementations in companies, about what are the main reasons that companies must be aware of and how a company can plan a CRM implementation with less

risk of failure. A strategy implementation doesn't have a single formula and can be perceived differently from one business to another, which means that other factors may influence the implementation of CRM in each case (Donaldson, 1996; Triznova *et al.*, 2015).

Companies must be aware that the implementation of a CRM strategy does not depend of one factor, but it is the result of several factors that interact with each other and guarantee its success (Becker *et al.*, 2009). Nonetheless, the three influencers in the current study are always presented as the most relevant ones in the literature that focus this matter (Mendoza *et al.*, 2006; Raman *et al.*, 2006; Payne and Frow, 2006; Foss *et al.*, 2008).

A CRM strategy cannot be one single process inside a business structure. It is a combination of several interconnected processes that influence different areas within its structure (Payne and Frow, 2006). It can be considered a mix of culture and process change, based on motivated and trained people, supported by technology that will aggregate, analyse and enable customer information, working on long term and strong relationships with customers (Mendoza *et al.*, 2006).

It is expected that companies will be able to realize the factors that they must take into consideration before starting a process of implementation of the CRM strategy. This knowledge will allow the project not to be part of the high percentage of failure of these strategies as presented in the previous section.

What Steel *et al.* (2013) consider is that CRM strategies usually failed to meet the expectations. The expectations linked to the implementation of a CRM strategy are, from a global business perspective, increase customer loyalty, improve customer satisfaction and customer retention that will lead to improve profitability and revenue (Steel *et al.*, 2013).

Previous studies showed that companies need help in setting objectives for CRM strategies and a plan that will guarantee that those objectives are achieved by the end of the implementation. The lack of a correct design of the CRM implementation project is one of the presented reasons of failure (Payne and Frow, 2006).

In the following subsections we will explore the factors chosen in this study. It is fundamental that companies realize what should be developed in their business before starting a CRM implementation process and, by doing that, increase the likelihood of being successful in this process.

2.3.1 Culture and Processes

In a company, culture is what defines the behaviours and the way of doing things, through rules not imposed, the sharing of social behaviours and the sharing of a common goal (Vazifehdust *et al.*, 2012).

According to Foss *et al.* (2008), the failure of a CRM strategy implementation will be probably high if companies don't have a clear plan, don't define the objectives for the strategy and don't realize that a CRM strategy implementation will implicate a change in business culture and structure.

The knowledge of the existing organizational culture and a clear understanding of the business processes are critical to the implementation of a CRM strategy allowing us to understand what are the factors that must be changed and where we must act to ensure alignment of processes and people with the strategy (Chang, 2007).

Taking into consideration the current business context, it is understandable that companies are adopting and adapting to their business a customer-centric strategy (Smilansky, 2016).

According to Bob Azman, chief experience officer at Atvez Consulting Solutions, in Smilansky (2016), all the activities in an organization should be decided and measured based on customer experience. In the same article, Oren mentioned a study from Harvard Business Review Analytic Services and Strativity Group, where they conclude that 75% of the companies, in a survey made to 315 business executives, want to place the customer-centric strategy in a few years. Adopting a customer-centric strategy will require an alignment of culture and processes to the new objective, or if is not completely new, at least guarantee that all company understand the business focus, i.e. the focus is on customers.

When a company decides to implement a CRM strategy, the focus of its operations and processes must be on what customers and the market intends to buy and not the products and services that the company wants to sell. It is the only way for the company to survive in the business world (Boulding *et al.*, 2005).

Companies need to ensure that all interactions with customers must be detailed and perceived to create the best customer experience. At all levels in a company, the main purpose should be working to improve the customer experience (Raman *et al.*, 2006).

A CRM implementation implies a change in the way that things are done in a company, specially, in the processes and people related to customer experience and communication as sales teams, customer service, marketing, among others - each one of them will be responsible for the acquisition and consolidation of customer information (Chang, 2007).

Strategically, companies must be able to design the structure of the most relevant processes and the most important factors of these processes that will be fundamental in the implementation

of the CRM strategy and how they will affect and be affected by this implementation (Payne and Frow, 2006).

To conclude, companies need to care about sharing the culture that will match with a CRM strategy throughout all employees and processes of their business (Finnegan and Currie, 2010; Vazifehdust *et al.*, 2012).

2.3.2 People

Inside of an organization everything happens due to human resources. The employees at all levels are the ones responsible for business development (Reicher *et al.*, 2015). The process of implementation must be clear for everyone in the company and it is fundamental that the final purpose is known, and which is the path to achieve it (Payne and Frow, 2006).

This clear vision of the objective of the CRM strategy and the design of the project that will lead to the implementation process success requires the participation of the employees at all levels of the company.

People are a major factor of the success or failure of a strategy implementation and it may be crucial to explore two different perspectives in this matter 1) the role of management and 2) the importance of motivated and trained employees. It is fundamental the full commitment of managers and employees to ensure that they achieve positive performance results in the future. The commitment will be engaged if the organizational structure is built to integrate the new strategy and if it is made the investment in training and motivation of the employees that will be key features in CRM. For the employees' commitment, management support is crucial (Becker *et al.*, 2009).

There are different approaches of how to implement the CRM strategy: top-down approach or bottom-up approach (Ahearne *et al.*, 2012). As any other strategy, the discussion of which

approach is better is relevant for CRM strategy implementation. Companies should consider the pros and cons of the two approaches and choose one according to the business structure and the type of customer interaction.

Ahearne *et al.* (2012) suggest that the bottom-up approach integrates both managerial and operational people into the process, which leads to a complete overview from different sources of customer information. The customer information is gathered and spread throughout all levels of frontline interaction, which gives more flexibility to answer to customer needs. For a bottom-up approach companies should create project teams composed by the representatives of all sectors that are part of the process guaranteeing that all departments are involved and understood the CRM implementation objectives (Payne and Frow, 2006).

A qualified project team will help to solve the obstacles that will occur with the cultural change that is caused by the CRM strategy implementation (Becker *et al.*, 2009).

In the top-down perspective, the top management is committed to the strategy implementation, but there is a lack of knowledge from the frontline customer interaction, which leads to less capacity to provide proper solutions to customer needs. Also, the reaction of employees to something that it is imposed by management is usually an obstacle to the implementation success. It is easier to engage them in the strategy if they are involved in the process and if the individual contribute is allowed. For transactional environments, that don't require a relationship with customers, the top-down strategy may become a successful way to implement a strategy, but if the business is more complex and requires from a sales perspective, a high capacity to understand and predict customers' needs, the bottom-up approach is the best option, otherwise CRM strategy implementation may fail (Ahearne *et al.*, 2012).

The only way for a company to develop the strategy implementation successfully is guaranteeing the commitment of top management from the beginning. Without the approval and understanding from top management of the new culture and new processes, it is impossible to be successful (Mendoza *et al.*, 2006). In most of the projects studied by Payne and Frow (2006) the lack of understanding of management about the purpose of the CRM implementation, was a motif for the implementation failure. Senior management will have to be effective on leading the employees through all the changes that processes will face (Mendoza *et al.*, 2006), promoting training for employees and working for motivated teams (Payne and Frow, 2006).

A strategy of CRM implementation will have higher probability of succeed if management works as a sponsor of the project, engaging the involvement of employees into the strategy (Payne and Frow, 2006).

Kothandaraman *et al.* (2011) emphasized the importance of salespeople above all people in a CRM strategy. The authors considered that a company should not forget that the most important source of customer information and interaction are sales representatives and they should not be underestimated during the process of CRM strategy implementation.

In this sense, employees have a major role in the CRM implementation. Then companies should be able to recruit and train the best workers that will be motivated and will provide the best customer experience, leading to a greater business performance (Payne and Frow, 2006).

The authors, Becker *et al.* (2009), concluded that companies “should neither underestimate the influence of employee and management support on CRM performance nor overestimate the potential of CRM implementations”. The focus must be in well prepared and trained people towards CRM objectives, because

people is what really defines the interaction and communication in a business structure (Cambra-Fierro *et al.*, 2017).

Retain the best human resources and keep them motivated should be an internal strategy of every company (Mendoza *et al.*, 2006). Satisfied employees will be more committed to CRM strategy implementation and more focused on getting the final objectives (Mendoza *et al.*, 2006). Every company that will implement a CRM strategy must be aware that employee engagement is a major factor in the implementation success, because the employee's role should never be unappreciated (Payne and Frow, 2006).

2.3.3 Technology

The implementation of the CRM strategy is followed, most of the time, by the implementation of a new information system, a different software from the one is being used (Bull, 2003).

A technological tool that supports a CRM strategy is needed because the competitive environment that businesses live nowadays requires that they work constantly to ensure competitive advantage over the competition. Then it is necessary to continuously collect information on market expectations and trends and use that information to provide products and services according to them (Raman *et al.*, 2006; Chang, 2007).

CRM strategies are closely linked to technological programs and software that facilitate the collection, processing and storage of information about customers, in an organized and efficient way and that will facilitate the offer of personalized products and services (Levine, 2000 in Bull, 2003). However, choosing the best tool is not an easy task because there are many options in the market (Payne and Frow, 2006).

With a CRM system tool, the relationships with customers will be engaged and the tool will act as a facilitator of sales managers'

work, empowering them to answer more effectively to their customers (Yim *et al.*, 2004), meet their customers' expectations and consequently enhance the customer loyalty and satisfaction (Ali *et al.*, 2015; Kothandaraman *et al.*, 2011).

Since the information collected will be used at every level of interaction with customers, the value perceived by those customers will be higher and they will meet their expectations regardless of the department inside of the company that they are interacting with (Cambra-Fierro *et al.*, 2017).

So, the ability of the company to integrate its business processes before the software implementation will have a major role, being one of the major factors of success of the implementation (Cambra-Fierro *et al.*, 2017).

Going further in the definition of technology for CRM strategies, the literature showed a concept of technological structure – information and communication technologies (ICTs). ICTs are combinations of different software and communication tools providing information through one channel, i.e. different sources of customer information are aggregate in on technological tool that will be shared by every part inside of a company (Vazifehdust *et al.*, 2012; Alshawi *et al.*, 2011). It is also important to refer that the CRM technology has to be able to integrate with other software and hardware solutions that companies uses in their processes. The lack of integration will be an obstacle to the management of customer information and to the final objective of CRM, which is take the information at the right people at the right time (Finnegan and Currie, 2010). An important point on this issue is that the information system technology is considered a relevant factor for the success, but it is crucial that the technology fits the organizational structure and company processes, because the tool misalignment with these factors can lead to failure of strategy implementation (Ali *et al.*, 2015).

The evolution of information technologies in the organizational structure can be analyzed in two different approaches: static and dynamic. A static approach considers a fixed model of technological strategy over time, that follow a set of rules and processes. On the other hand, a dynamic approach considers that the changes on the environment and the evolution on business context should influence the technology strategy of a company (Sen and Sinha, 2011). Considering that companies are facing nowadays a highly dynamic business environment, with highly competitive context, the dynamic approach appears as the solution to avoid becoming obsoletes businesses, that are not able to respond to market demand (Sen and Sinha, 2011).

One of the reasons for the disappointment of companies regarding the results of the CRM strategy is to consider in the beginning that a CRM information system is a solution to all problems (Mendoza *et al.*, 2006) and therefore a lot of companies decide to acquire a technological software that will be essential to manage the information.

Companies must understand that the benefits of CRM won't show up as soon as they buy the software solution, because there are other factors that will influence the CRM results (Payne and Frow, 2006).

A technological solution should always be considered as part of the CRM strategy, and not the strategy itself (Foss *et al.*, 2008).

2.4 Conclusion

The literature showed that CRM is a holistic strategy that cannot be focused in just one part of all implementation process. A CRM strategy implementation will require a business culture focused on costumers with the processes and people aligned to the common objective of respond with the right products, at the right time, to the right customers.

Thus, the employees will have a major role in working to define the processes that permit to develop and successfully implement the CRM strategy. The importance of top management in guaranteeing that the new strategy is well perceived by all company and that employees are trained and motivated to achieve the goal of the CRM strategy shouldn't be forgotten.

Lastly but not less important, the information system. The technological part of the strategy that is required to enable the capacity of the company to collect, store, prepare and share customer information in an efficient and effective way through every departments.

Considering this literature review, the purpose of this work is to study, the influence of the cultural and processual factor, people factor and the technological factor. Those are the relevant factors that this work aims to study in a real case study that is currently implementing a CRM strategy. To do that the study adopts a case study methodology that focus the implementation of a CRM strategy in a Portuguese company of the cork industry. In chapter 3 the details of methodology are presented.

3 Research and Methodology

This chapter presents the research questions and details the case study and methodology used in this study, followed by the technics of collecting and analyzing data.

3.1 Research Questions

The purpose of this case study is to understand if the three major factors identified in the literature review - business culture and processes, the people in the company and the technology are relevant for the success of a CRM strategy implementation and if are present in the current CRM implementation at a Portuguese cork company in cork industry - Cork Supply Portugal. To do this, we need to answer the following questions:

1. How does the culture and processes affect this implementation?
2. How committed are the employees and top management with this implementation?
3. How does technology affect the implementation of the CRM and its success?

3.2 Model of Analysis

The model depicted in Figure 1 presents the three factors that are determinant in the success of a CRM strategy implementation. Taking into consideration the research questions and the objective of this case study the model will work as a guideline of this analysis.

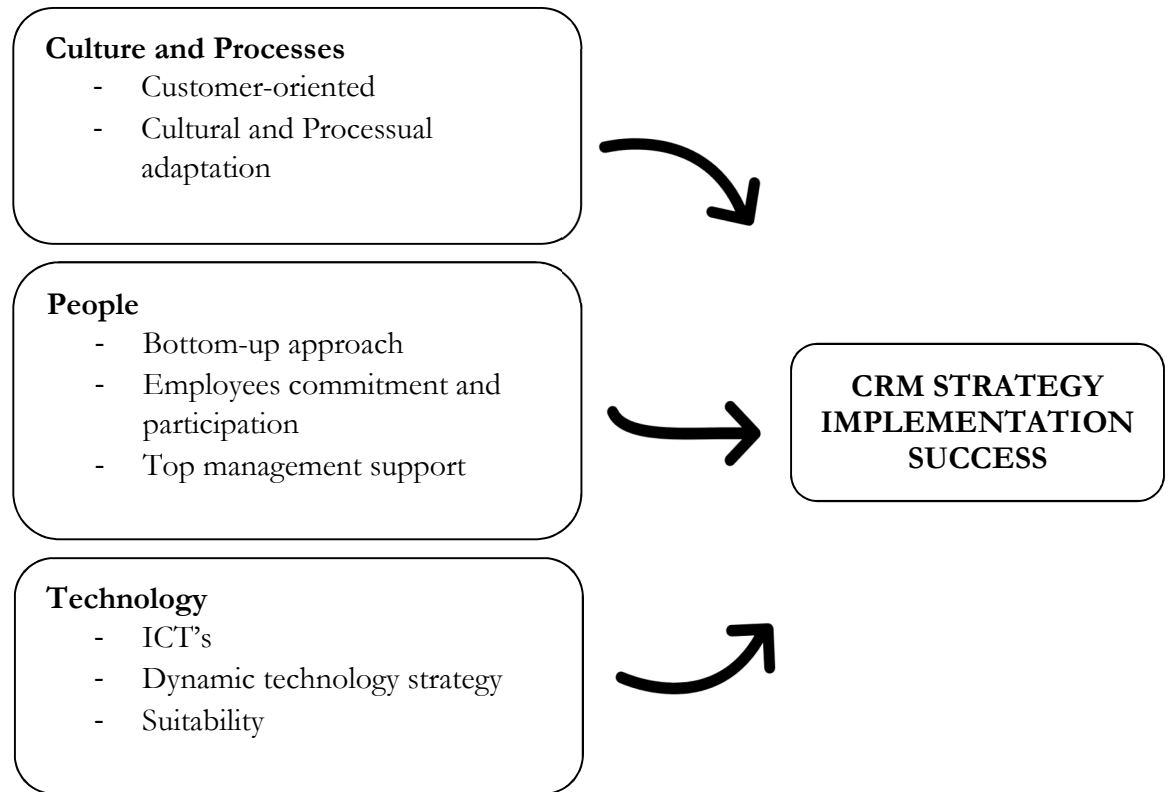


Figure 1 - Model of Analysis

The model of analysis suggests that the three factors are related to the success of the CRM strategy. As presented by Boulding *et al.* (2005), a CRM strategy implementation is responsible for creating value for both customers and companies, using technology to manage information and spreading that information through all the right users, at the right time. To achieve this objective, the culture and processes, the people and the technology must be aligned with the strategy.

3.3 Research Methodology

The research methodology must guarantee that the investigation questions are answered, and that the final objective of this study is achieved. In this study the adopted methodology is qualitative research, specifically the case study method.

The case study method, according to Yin in Bruns (1989), is a useful method when the object is a contemporary topic that will

be studied in a real business context. In this case the objective is to understand how the identified factors, that impact the success of a CRM implementation, are influencing or not the CRM strategy implementation in Cork Supply Portugal, a Portuguese company in the cork industry.

When a deeper understanding of organizations and people are needed, as the understanding of unique conceptions and ideas of those organizations and people, the qualitative research is considered the best methodology (Berg and Struwig, 2017). In a specific context, the interaction between the investigator and the object in study have a high importance. The researcher should interpret the reality in which the object of study is inserted (Aires, 2015).

To collect data, the study used semi-structured interviews made to employees of the company that are related to the implementation of the CRM strategy. The semi-structured interviews provide the ability to conduct an open interview where the investigator can get detailed interpretation of matters that cannot easily be presented in a questionnaire or in a structured interview. Also, the interview can be adapted according to the responses of the interviewer, the communication between the participants is easier, thus increasing the exchange of perceptions (Berg and Struwig, 2017; Aires, 2015).

According to the literature the qualitative research based in semi-structured interviews appears to be the best methodology for this study. This methodology will help the study to capture the personal and organizational experience of each participant in the implementation of the CRM strategy, helping to understand the positive and negative factors of this experience.

3.4 Sample Selection

Cork Supply Portugal was the chosen object for this study because it is a real example of a CRM strategy implementation and the insights that will be shared in the end of this study can be very helpful to the company's CRM process. Also, the interviewer had easy access to the participants which facilitated the data collection. This case study we will be focused on the company perspective of the CRM strategy implementation.

The selection of the interviewees was made based on the following criteria: (1) the interviewees have contact with customers in their daily work, (2) the interviewees are from different areas of the company and (3) the interviewees have different hierarchical levels. With the first criteria the objective is to understand how the information is being captured and if the information is available every time that is needed. The employees should be capable to have all customer information when they have to interact with the customer. The second criteria will help to obtain a holistic view of the CRM process implementation. During the CRM strategy implementation, the importance of having a project team with different inputs from different areas is one of the pointed success factors. Interviewing different employees from different areas will give the full picture how involved are the departments in the process. The last criteria will enable to have the experience of employees in different hierarchical levels. A CRM strategy should be perceived by everyone inside of the company, independently of the level in the hierarchical structure. One of the major factors of success is having a customer-oriented culture and the culture should be impregnated at every company structure layer.

Table 1 are presented by interviewee the role that has inside of the company.

Table 1 - Interviewees role in the company

ROLE	N° INTERVIEWEES
CEO	1
OPERATIONS MANAGER	1
QUALITY CONTROL MANAGER	1
PRODUCT MANAGER	1
SUPPORT MARKET MANAGER	1
CUSTOMER SERVICE	1
SAMPLING DEPARTMENT	1
SALES COUNTRY MANAGER	2
SALES REPRESENTATIVE	2
MARKETING MANAGER	1
IT SUPERVISOR	1

The departments chosen to be interviewed are important, in a customer perspective, for Cork Supply Portugal. Although they might not have the same importance for other type of industries, at the cork businesses those departments play major roles, with different ways of interaction, to customer satisfaction and retention. The sample is composed by employees that work in different countries, ten of the participants work and live in Portugal and the other three work and live in Spain.

3.5 Data Collection

The study includes semi-structured interview of 13 staff and managers. Nine interviews were conducted in person and the other four were made by phone; all of them were recorded and after transcribed in. The interviews were made in the native language of each participant, which means that ten of the interviews are in Portuguese and three of the interviews are in Spanish.

The questions for the interview were related to the literature review presented in chapter 2 and with the analysis model (see figure 1), these relations are in the table 2.

Table 2 - Interview script and variable/codes

Analysis Dimension		Interview Script Question	References
Culture and Processes	Customer-oriented	Q1: The culture of the company is customer-oriented?	Boulding <i>et al.</i> , 2005; Raman <i>et al.</i> , 2006; Smilansky, 2016
		Q2: All processes are design with the objective of increase customer satisfaction?	
Culture and Processes	Cultural and Processual adaptation	Q3: The CRM strategy had changed the processes and way of doing things?	Payne and Frow, 2006; Chang, 2007
		Q4: The necessary changes were easy to implement?	
People	Bottom-up approach	Q6: The CRM strategy was design and implement by top management?	Ahearne <i>et al.</i> , 2012; Payne and Frow, 2006
		Q10: Was created a project team with different people involved?	
People	Employees commitment and participation	Q5: You were involved in the project development?	Payne and Frow, 2006; Becker <i>et al.</i> , 2009; Cambra-Fierro <i>et al.</i> , 2017
		Q11: Dou you think that CRM strategy will engage customer	
		Q12: Dou you think that CRM strategy will facilitate the information flow?	
		Q13: Do you believe that CRM strategy will improve your work? So you think you will be able to perform better your activities?	
People	Top management support	Q7: Top management worked as sponsor of the project, being involved from the beginning?	Payne and Frow, 2006; Mendoza <i>et al.</i> , 2006; Becker <i>et al.</i> , 2009
		Q14: The employees had access to training programs for the new processes of CRM strategy?	
		Q8: The CRM strategy was explained and presented to all company?	
Technology	Suitability	Q15: The CRM strategy implicated an implementation of a new technological tool?	Cambra-Fierro <i>et al.</i> , 2017; Ali <i>et al.</i> , 2015
		Q16: The company current processes were implemented in the new	
Technology	Dynamic technology approach	Q19: The technology of CRM is adapted to business changes?	Ali <i>et al.</i> , 2015; Sen and Sinha, 2011
		Q20: During the process of implementation the technology was able to adapt when something changed in the process?	
Technology	ICT's	Q17: This tool is able to aggregate different sources of customer information?	Vazifehdust <i>et al.</i> , 2012; Alshawi <i>et al.</i> , 2011; Finnegan and Currie, 2009
		Q18: This tool is capable to integrate with other technological systems that are used by the company?	

To each participant was explained the purpose of the study and that the data would be displayed in an anonymous way and used only in this academic study. The interviews were based on an interview script based on the literature review.

3.6 Data Analysis

After the data collection the information from the interviews must be prepared to be discussed in the next chapter. As Bardin (2009, pp. 103) stated, “treating the material is coding it”. Coding the data, based on settled rules, enable the investigator to aggregate different interpretations and perceptions of the context in study, making the data analysis easier (Bardin, 2009). The codification objective is to blend different perspectives and

find common elements between them (Bardin, 2009). The name of the role of each interviewee was substituted by a code.

Table 2 presents the script questions, and the corresponding sources, variables a coding theme (sub-variables). The analysis required the creation of subsections that allowed a clearer analysis of the answers. For each dimension were also transcribed parts of interviews that help to have a deeper analysis of the content identified by the code attributed to the interviewed.

In conclusion, the data analysis presents a systematic format that facilitates the reading of the content and, for a complete analysis of the answers, were written the interviews transcriptions.

3.7 Summary

This chapter defines and explains the research questions and integrates them in the model of analysis that will lead this case study. The next presents and discusses the study results.

4 Results Presentation and Discussion

This chapter begins by introducing the study object - the company Cork Supply Portugal. Then follows presentation and discussion of the results in the light of the literature review, organized in subchapters, according to each of the dimensions presented in the analysis model (see figure 1).

4.1 Study Object – Cork Supply Portugal

To better understand the context of the answers given by the interviewees, a brief introduction will be made to the object of this case study - Cork Supply Portugal, a Portuguese company that operates in the cork industry.

Cork Supply Group (CSG) was founded by Jochen Michalski in 1981. His vision was to provide the growing boutique wine industry with premium natural corks. Started in Northern California, CSG had easy access and visibility to one of the biggest wine-producing regions in the world. Unlike other companies, Jochen Michalski wanted to focus only on natural corks. This way, he could focus all his time on a single product instead of balancing multiple products at once. Narrowing Cork Supply Group's focus to natural corks in America, allowed the company to develop a reputation built on integrity and superior service. With ongoing success, CSG was expanded globally to bring the vision of providing high quality wine closures to international markets.

As the closures business expanded, the group formed several strategic partnerships to bring even more high-quality wine packaging options to its customers. Through its partnerships, CSG has positioned itself to be a full-service wine packaging company. Today, Cork Supply Group specializes in the premium wine packaging business with several different business groups,

long-term strategic partnerships, and a multitude of high-quality product offerings.

As a global industry leader, Cork Supply focus on long-term business success through the production and distribution of premium wine packaging and supply products and services.

Cork Supply Portugal is part of this group, being the only one company responsible to produce cork stoppers and supply the rest of the group. As a member of CSG, Cork Supply Portugal share the same vision, mission and values, that are reflected in every strategy developed and, in every process, implemented.

Figure 2 depicts the presence of the group worldwide.



Figure 2 - Cork Supply Group Worldwide

From a few years now, the company is implementing a CRM strategy. A project that embraces all the group companies with the same process but considering different approaches according to each company characteristics. So, the group has different rhythms on its CRM strategies implementations and this case study will be focused in the Portuguese example.

4.2 Culture and Processes

The implementation of a CRM strategy implicates, most of the times, a “new culture” (Mendoza *et al.*, 2006), which means the business atmosphere has to be focused on customers, as the way things are done, i.e. all the processes implemented in the company. This section analyses the answers given in the interviews regarding this subject at Cork Supply.

4.2.1 Customer-oriented

Table 3 - Customer-oriented culture and processes answers

Customer-Oriented	Interviewed
Focus on Customer	
Focus on Customer	I1, I2, I3, I4, I5, I6, I7, I8, I11, I13
Focus on Customer more than on profit	I9, I12
Non Customer Oriented	I10
Processes Design	
Focus on customer satisfaction	I1, I2, I3, I4, I5, I6, I7, I8, I9, I11, I12, I13
Customer satisfaction is the goal but it doesn't happen in reality	I10

Through Table 3 we can conclude that Cork Supply's culture is undoubtedly customer focused. Of the 13 interviews conducted, only one participant responded negatively to this question. Reinforcing the idea above, 2 of the interviewees (I9 and I12) stated that in some situations the focus is on the customer rather than the profit, which highlights the importance of the customer for management strategy. About this the following statements are transcribed:

“I think the company is very focused on customer service, think more about the customer than the sale.” (I9)

“We put the customer first in everything (...) to the point of probably doing business only for the client and not thinking properly about ourselves, that is, discovering later that the business we do, many of

them are not even profitable for us, but as we do not want to leave a customer look bad or say no, we accept it.” (I12)

Still on the customer-focused culture, some of the respondents reported that Cork Supply Portugal has its genesis in this vector. Since its creation the customer is the focus of the development of its activity and its position in the market, as stated below:

“Cork Supply has always had a culture focused on the customer. Since its beginning in 1981.” (I1)

“The company was born for that purpose (customer satisfaction) and was born as a trading company, period. We did not have the production part, so our focus was "what does my client want?" and "where can I find this?" And that, although the structure has already changed, and we already produce stoppers and have a completely different dimension, this orientation has not changed.” (I12)

The results suggest that that customer satisfaction is one of the fundamental values of the company, as stated by the interviewee 4:

“One of Cork Supply's main values is customer service and so, all the decisions that are made, and more in my business area (sales), are given much focus on the importance of what the customer wants and anticipate a little bit his needs.” (I4)

The culture in a company is what explains the way things are done, it is something not physical that is shared by everyone (Vazifehdust *et al.*, 2012). It is crucial to understand if the processes of Cork Supply have an intrinsic objective customer satisfaction. The answers to question 2 (see table 2) suggest that, in most of the cases, customer satisfaction is present in every process regardless the area of the company. Of the 13 interviewed, 12 answered positively to this question.

4.2.2 Cultural and Processual Adaptation

Table 4 – Cultural and Processual adaptation answers

Cultural and Processual adaptation	Interviewed
Changes on current processes	
CRM strategy changed processes and the way of doing things	I2, I4, I5, I7, I10, I11
Didn't have any changes during implementation	I1, I3, I6, I8, I9
Unawareness of changes that have occurred	I12, I13
Ease of deployment	
No changes were made to the processes	I3, I9
The changes were difficult to implement	I1, I2, I4, I5, I6, I8
The new processes were easy to implement	I7, I11, I13
Not aware of processes and the need to implement changes	I12

As Chang (2007) referred a CRM implementation implies a change in the way things are done in a company. Table 4 shows that the issue studied in this subsection is not clear among the sample group. From 13 interviewed, approximately half of them considers that the CRM strategy changed the processes of Cork Supply. The other half of the participants doesn't agree and stated that they didn't find any changes on the processes and in the way of doing things. The following excerpts provide an example to each of the cases.

"(...) when I came here to work already existed, which I was accompanied I think it was a natural evolution of the CRM process itself and yes, it has evolved a lot over the years, without a doubt."
(I2)

"Still not much. Especially at the level of commercials, I do not see this big change." (I8)

Additionally, 2 interviewees expressed their total lack of knowledge about the processes and the changes involved in the implementation of the strategy, which reinforces the inconsistency at this level. In the case of interviewee I13, his role in the company is technical support. As a result, the interviewee revealed a lack of knowledge about changes to the

processes related to the CRM strategy, but, considering the scope of his functions, the technical changes in software tools that were required, were easy to implement.

The easiness of implementing changes on Cork Supply's processes equally shows divergent answers, confirming the idea that this theme is not clear and comprehensible by the participants. Six of the participants considered that these changes were difficult to implement because of several factors, with main one being the lack of communication.

"I think the strategy that was outlined was pretty clear, but I think it was not passed on very clearly to everyone. Therefore, answering for me, yes; responding in general I think not, not in a 100% clear and equal way for all." (I4)

Interestingly, 1 of the 3 respondents who considered that the process changes, that are inherent to the implementation of the strategy, were easy to implement was due to a good communication of those changes, as the following transcript shows:

"I believe that most of the changes, or practically all have been explained in the commercial meetings, not even by email. Whenever an important change has been implemented, it has been communicated in meetings, always in person." (I11)

The answers' incoherence shows a lack of clarity in the presentation of the strategy which difficult the processual adaptation to the CRM strategy.

4.3 People

The success of CRM strategy implementation is strictly related with the commitment of the company's people. The top management and the employees are responsible for the development and implementation of the strategy. This section analyses the involvement of Cork Supply workers and managers.

4.3.1 Bottom-up approach

Table 5 - Bottom-up approach answers

Bottom-up Approach	Interviewed
Top Management Involvement	
Top Management was involved	I1, I2, I3, I4, I5, I6, I7, I8, I9, I11, I13
Unawareness regarding Top Management Involvement	I10, I12
Multi-disciplined project team	
Project team with representatives from different areas	I2, I4, I5, I6, I7, I9, I11, I12, I13
Project team didn't include representatives from different areas	I1, I3, I8, I10

In a bottom-up approach the process of implementing a strategy is shared by management and operational workers, in a combine project that integrates different point of views (Aherane et al., 2012). In this sense companies should create multi task teams gathering the ideas and necessities of each department into the strategy (Payne and Frow, 2006). Table 5 shows that top management participated in the CRM strategy design and implementation at Cork Supply. 11 interviewees were positive on this issue, as some of their statements display:

“I know you are involved and have tried for some years to effectively implement this tool.” (I3)

“I think it comes from the administration. I think that, if not, you could not implement something like that.” (I11)

Only participants I10 and I12 were not familiarized with the involvement of top management in this strategy. For the others, it was clear that the top management settled the objectives for the CRM strategy and passed the project development to the rest of the teams:

“(…) the top management gives the macro objectives. And there is a macro plan that we must carry out and the objectives we must achieve,

then the operationalization, the detail of the process, of course it is not so involved (...)" (I2)

"The goals were outlined by the top management and implemented later was by the more teams on the ground." (I7)

9 of the participants confirmed that in Cork Supply was created a multi task project team with representatives of the main departments involved in the strategy. From the non-positive answers to the creation of a project team it is important to analyse in detail 3 of the interviewed statements, they have a common justification explaining the disagreement with this question. During the CRM strategy implementation at Cork Supply, these 3 participants considered that the project was concentrated in one person (a sales manager that no longer works in the company), and this centralization frustrated the opportunity of bringing other areas into the project. They also considered that this was an error and a factor for the project delay:

"(...) this was our mistake. The project was delivered to the sales director, who eventually left, and had one more person working with him, and it was all very centralized in his hand, and therefore was miscommunicated and wrong." (I1)

"No, there was not. There was neither team nor representatives. Particularly of the areas involved. There is the finger on the wound¹ that I put in relation to the previous commercial direction." (I8)

It is possible to conclude that Cork Supply has a bottom-up view of the CRM strategy. Top management was involved in the project, but did not impose the new strategy, allowed its implementation and design to be developed by the company's employees.

¹ It's a Portuguese expression "colocar o dedo na ferida" that means refer to a delicate subject, touching a weak point of someone.

4.3.2 Employees commitment and participation

Table 6 - Employees commitment and participation answers

Employees commitment and participation	Interviewed
Involvement on the project development	
Interviewed was involved	I1, I2, I4, I5, I6, I7, I8, I9, I11, I13
Interviewed was involved but not directly	I3, I10, I12
Believe that CRM strategy will engage customer satisfaction	
Full agreement	I1, I2, I3, I4, I5, I6, I7, I8, I9, I10, I11, I12, I13
CRM strategy facilitate the information flow	
Full agreement	I1, I2, I3, I4, I5, I6, I7, I8, I9, I10, I11, I12, I13
CRM strategy can improve employees work	
Full agreement	I1, I2, I3, I4, I5, I6, I7, I9, I10, I11, I12
Don't agree	I13

Employees are responsible for the implementation of everything that is developed in a company. Their involvement is a key factor when we are talking about a CRM strategy implementation. The results depicted in Table 6 show that Cork Supply encouraged the participation of employees interviewed in the implementation of the CRM strategy. 10 of the interviewees confirmed that they were involved in the implementation, while the remaining 3 were also part of the process in a certain level, although not directly involved,.

According to Becker *et al.* (2009) the commitment of the employees with the strategy in implementation is a factor of success. According to Table 6, the commitment in Cork Supply is general. All the participants answered that they believe and are confident that the strategy will increase customer satisfaction, the flow of information between the departments will be easier and, in general, they believe that they will perform better their job activities, as the excerpts below show:

“(...) if we have a way of managing the information we receive from the market, whether it is from customers or from potential customers and we are able to proactively work on that information and respond to the market, in addition to increasing customer satisfaction, we will be able to increase market share and get new customers.” (I4)

“I think so because it first allows the entire team that relates to the client to have access to the same information and this will facilitate (...) I think it will improve the relationship with the client soon increases satisfaction.” (I7)

Next are also presented some transcriptions confirming that Cork Supply employees believe that the CRM strategy will facilitate the flow of information and improve the performance of their roles:

“Completely. Especially at the level of the activity of the sales representatives itself, because we sales representatives are quite disorganized by nature, especially when each one of us works in his own way, and therefore there is a lot of information that is lost. And this can sometimes lead to customer dissatisfaction. Or at least, no customer satisfaction.” (I8)

“It is important that information about each client flowed among several departments, this is very important. If the information doesn't flow between the company's departments, it's difficult to coordinate all this well.” (I10)

To clarify I13's answer, he considers that the CRM strategy won't be very helpful in his work because he has a technical support role that is not directly related to the final customer.

In conclusion the employees of Cork Supply are committed to the CRM strategy in the sense that they believe that this strategy will benefit to customer retention and satisfaction enabling an improve on the design processes for each area.

4.3.3 Top management support

Table 7 - Top Management support answers

Top Management support	Interviewed
Top Management as a sponsor since the beginning	
Top Management was an active sponsor of the strategy	I1, I2, I3, I4, I5, I6, I7, I8, I9, I11, I13
Unawareness of Top Management sponsorship	I2, I10
Occurrence of training programs	
Training programs were planned	I2, I4, I5, I6, I7, I9, I11, I12, I13
Need of training programs	I3
Unawareness of training programs	I1, I8, I10
CRM Strategy presented/explained to all company	
CRM Strategy was explained	I2, I6, I7, I9, I11, I13
CRM Strategy was explained but not in the same way to all the departments	I4, I5
CRM Strategy was not explained	I1, I3, I8, I10

Top management should work as a facilitator and a promoter of the CRM strategy at all levels, ensuring that employees are properly trained and motivated to implement and develop the strategy. Table 7 presents the interviewees' perspectives regarding Cork Supply's top management support. From the beginning of the implementation process, Cork Supply's top management sponsors the strategy, confirmed by the 11 respondents' positive responses.

Although the process of implementation of the CRM strategy is still ongoing in the company there have already been some training programs. However, the idea that there is still the need of more training is reinforced by the respondent I3:

“There are training plans (...) at this time there is a partial implementation in some markets, if it is successful it will be extended to all and there will be defined a training plan for all who are involved.” (I3)

Three of the interviewees didn't consider that until today training plans have existed:

“No, there has not been anything yet (training programs), but it will have to exist (...) we are basically starting almost from the beginning, I do not say start from zero because part of the Salesforce is already very customized, with important things to control our sales process, but in any way, in terms of training, in terms of communication was very, very bad.” (I1)

The following paragraphs focus on the communication of the CRM strategy to the company's employees. This last issue was pointed out by some interviewees as one of the flaws of the process. 6 of the 13 interviewees considered that the strategy was not explained to Cork Supply employees or that it was not communicated in the same way to the employees.

“So, it was not well communicated, it was not well managed, there’s a lot here to communicate from Cork Supply regarding the implementation of Salesforce.” (I1)

“(...) I think the strategy was well defined, but later it was not well followed, it was not well communicated; the training was not well planned, and I think that in this aspect the system did not follow the development that was expected (...)” (I5)

In most cases, it was considered that employees who deal directly with the customer are aware of the CRM strategy and what the strategy implies, but in areas that don't work directly with customers this awareness is not clear.

4.4 Technology

Technology plays an important role concerning CRM strategies. To have all the information about customers and markets companies feel the need to have support in a software tool capable of gather and storage information from different sources. Having available the information at the right time is crucial to give the proper answer to customer needs and questions. The following subsections detail this issue.

4.4.1 Suitability

Table 8 – Suitability answers

Suitability	Interviewed
CRM Strategy required a new technological tool	
Required a new technological tool	I1, I2, I3, I4, I5, I6, I7, I8, I9, I11, I12, I13
Didn't need a new technological tool	I10
Implementation of current processes on the new CRM tool	
Implementation of current processes	I1, I2, I3, I4, I5, I6, I7, I8, I11, I12, I13
No implementation of current processes	I9

CRM tools are part of the technological tools that allow the company to store and share customer information in a systematic, clear and up-to-date way. In the case of Cork Supply the technological tool to support the CRM strategy was acquired during the process. Presented in general by the interviewees, excepting the interviewee I10, the tool adopted is the Salesforce²: The design of this tool was based on current Cork Supply processes as reported by 12 of the interviewees.

During the interviews it was even referred a sales process shared by all the companies of the group that served as basis for the construction of the CRM strategy. The several technological tools adopted by the companies were based on the principle of adoption this process and, like other companies, Cork Supply Portugal adopted the same plan in the development of Salesforce:

“the system is being done, and was done to reflect the process, otherwise wouldn't make sense, because the process and strategy were passed on to the sales teams, they work knowing that there is a sales process that they have to follow and that the goal is that the client

² Source Salesforce website: “Salesforce is the world’s #1 Customer Relationship Management (CRM) platform. Our cloud-based applications for sales, service, marketing, and more don’t require IT experts to set up or manage — simply log in and start connecting to customers in a whole new way.”.

feels this and that and that responds in this way (...) therefore the system is designed to give us the answers.” (I5)

One of the participants even commented that at this time the tool is too customized:

“Salesforce is customized, and we concluded that is perhaps too customized, and this is what is going to try to fix now. And make the tool attractive in a way that makes sales representatives’ life easier, which is the only way for them to buy the process and start using it with good will.” (I1)

This last comment was supported by the statements of I8 and I9 that consider the tool designed without knowing the perspective of the final user, i.e. the processes are implemented but not in a way that, instead of facilitating the work of the end user, is making their work more difficult:

“someone from the sales department that is on the market and will going to use it (the tool). Because I think it has turned into something just to fill up with no objective ...” (I8)

“It would be easier to have all this information: have a history of orders, complaints, the whole history of the client. I do not know how, but I think it has to be something more practical or faster (...) Salesforce, I find a tool too heavy to work.” (I9)

To sum up, the tool was designed considering the needs of Cork Supply but should be adapted taking into account the users’ needs and the requirements that each one has in its role.

4.4.2 Dynamic Technology Approach

Table 9 - Dynamic technology approach answers

Dynamic technology approach	Interviewed
CRM technology adaptation to business changes	
CRM technology can adapt	I1, I2, I3, I4, I5, I6, I7, I11, I13
Unawareness of this capability	I8, I9, I12
CRM technology adaptation to changes on company's processes	
CRM technology can adapt	I2, I3, I4, I5, I6, I7, I11, I13
Unawareness of this capability but believe can be possible	I1
Unawareness of this capability	I8, I9

The objective in this subsection is to confirm if the tool adopted is dynamic when faces the specific characteristics of the business and the changes that may occur. The implementation of the strategy is still ongoing so not all respondents have had a user experience with the tool, however, it is consensual the idea that Salesforce is able to adapt to business changes.

Interviewees I5 and I12 report that the same tool is currently being used in another company in the group and has been able to adapt. In the first place because the company in question has different business units with specific characteristics that require different needs to the program; in the second place, because they are currently making changes to the current structure of the program and the program has been able to integrate those changes. Thus, by comparison with another similar situation, they consider that the tool at Cork supply Portugal is capable to adapt:

“(...)in the US we use the salesforce, and we only sell cork stoppers here (in Cork Supply Portugal), but they sell barrels, corks, capsules, synthetic corks, and the system is prepared for all different product types; and one thing is to sell a cork, another is to sell a barrel - are different products, the process is completely different and the system

is working well for both, so I believe it is more than possible to be changed and follow the evolution of the business.” (I15)

“I cannot evaluate if it’s easy, I can say that it is possible because I know, for example, the company we have in the United States is currently in a situation where they think that Salesforce was not designed for the current situation and they want to change their entire structure.” (I12)

During the implementation process it was intended to see if there had already been changes in the processes and if the tool was dynamic enough to easily adapt. To this question the respondents assumed an equally theoretical answer. Without a robust knowledge about the capabilities of the tool, they generally consider that it was able to change its structure for the specific requests of the company.

4.4.3 ICT’s

Table 10 - ICT's answers

ICTs	Interviewed
Aggregation of different sources of customer information	
Capability of aggregation	I1, I2, I4, I5, I7, I8, I9, I11, I12
Capability of aggregation but not completely	I6
Unawareness of that capability	I3
Aggregation with other company technological systems	
Capability of aggregation	I1, I2, I4, I5, I6, I7, I11, I12
Capability of aggregation but not completely	I8, I9
Capability of aggregation on theory but not in practice	I3

One of the most important objectives of a technological tool is to aggregate customer information in a single platform capable of being shared and consulted by any user who needs the information. For this, it is important that the tool can aggregate different sources of information (Vazifehdust *et al.*, 2012;

Alshawi *et al.*, 2011) and to integrate information systems that are part of the company's technological structure (Ali *et al.*, 2015).

The results obtained in Table 10 on this subject confirm that Salesforce is, for the sample interviewed, considered a tool capable of aggregating different sources of information from different types of information platforms such as mobile phone, internet, computer, etc.

It is also able to integrate with the company's current information systems, the most important ones pointed out by the interviewees: the integrated management system and Outlook.

4.5 Conclusion

In this chapter we present the results obtained in tables for an easier understanding and the results are justified with interview transcripts.

For a systematized analysis of the results, to each section (study dimension) were added subsections that are related to the literature review presented in chapter 2.

The next chapter presents the conclusions of this case study, as well as the limitations of the study and other suggestions for future investigations.

5 Conclusions

The purpose of this case study was to answer the research questions and understand what is the impact that culture and processes, people and technology have in the CRM strategy implementation of Cork Supply Portugal.

It was important understand if Cork Supply has a culture focused on customers and considering the results, it can be concluded that the company has it. This focus on customer can be felt in the interviewees' speeches that several times mentioned the importance that the client has in the performance of their functions and processes. According to literature review a customer-focused culture will benefit the CRM strategy implementation because it is responsible to spread through processes and people the objective of satisfy and retain customers.

In a CRM strategy implementation companies must orientate their culture and operations towards the buying intention of customers and markets (Boulding *et al*, 2005).

Regarding processes the results shown a flaw in the strategy implementation process. The miscommunication of the strategy objectives and plan was identified when the interviewees revealed a lack of knowledge about new processes design and implementation regarding CRM strategy. Which resulted in a difficult implementation of the new processes. One of the factors that contribute to the failure of a CRM strategy implementation is the lack of clear objectives (Mendoza *et al.*, 2006).

Regarding the bottom-up approach that is important to involve all the employees of the company into the strategy the Cork Supply the results stated that the strategy was designed and started by top management but then, the responsibility of implement the strategy passed to operational areas.

A CRM strategy implies the participation of different areas in one project team, insuring that the strategy is built around different perspectives (Ahearne *et al.*, 2012). In this case study it is verified that the creation of a multi task team is important for the CRM strategy implementation. The implementation made without considering different areas that are related to customer interaction can lead to project delays and difficulties in its implementation.

The commitment and participation of the employees in the implementation is pointed as crucial. It enables the deployment of the strategy in a smother way. Usually employees don't are open to the changes that a CRM strategy implicates (Becker *et al.*, 2009). In this study we can't confirm what literature presents because, although the knowledge about the CRM strategy is not equal through all the interviewed, they all support this strategy. So, we cannot conclude that a CRM strategy implementation will be successful or not because of employees' commitment. The case study shown that, even without a well communicated strategy and without the integration of all the areas, the employees are committed with the strategy. In general, all the participants considered that this implementation would mean an improvement on their performance and, certainly, will promote a better relationship with customer, as it will also increase their knowledge about the markets where the company operates.

The top management support turned out to be an important factor. The data suggest that is fundamental that top management guarantees the communication of the strategy plan and objectives. The communication of the CRM strategy was not well perceived and exists, among the participants, incoherent knowledge about the objectives and the implications of the strategy in the company culture and in the business processes. The study reveals that top management support has impact in the CRM implementation. The top management must

communicate the objectives of the strategy (Mendoza *et al.*, 2006) and create training plans to keep the employees motivated during the process implementation (Payne and Frow, 2006).

A technological tool will be helpful if it is able to flow customer information in one platform that it is accessible by any user by the time they need the information, in a clear and systematic way (Levine, 2000 in Bull, 2003).

It is also fundamental guarantee that the technological tool can aggregate the business processes and, equally, it can be integrated in the information systems company's structure.

According to the study results, the lack of different perspectives of different areas into the strategy design, led to a tool customization that doesn't fulfil the users' needs. As Finnegan and Currie (2010) said the lack of process integration in technological tools can be a reason for the strategy implementation failure.

To conclude, it can be confirmed the importance of a culture customer-oriented that will enable the design of processes according to the CRM strategy objectives. It is also suggested that top management has a crucial role of communicate the strategy objectives to promote the participation of all areas. The creation of a multi-task project teams will enable a CRM strategy with the several areas that influence customer experience and will be important, also, in the integration of business processes into the technological too. Avoiding the customization of a heavy and complicated tool.

5.1 Theoretical and management contributions

There are numerous studies about the factors that determine the success of a CRM implementation, and specially about the factors that were previously analysed. However, few are those that, in the concrete case of an existing company present

empirical data on the impact that the factors under analysis can have overall. Thus, this study has this possible merit: provide relevant data on the impact of these factors in the implementation of a CRM system, in a more real context.

At the managerial level, the results can be common to other companies that can benefit from this study. For example, the results show that the communication from the top management to the company, explaining what a CRM system is, what are the possible changes in the company or what is the added value it can bring, was considered very relevant to the lack of knowledge about some issues related to the CRM strategy at Cork Supply. At the same time, another relevant aspect relates to the importance that the planning and the design of the tool may have. In this case it was exclusively under the control of one person, who later left the organization, which represented a major setback for Cork Supply in its implementation of the strategy.

In this way, this study shows that these aspects are extremely important and that they can't and shouldn't be neglected, in future implementation projects. Communication should be clear and cross-cutting, so that all employees are on the same page and planning shouldn't be under the responsibility of just one person.

Finally, this study also showed that building multivalent teams, which will be the basis of a CRM implementation, involving people from different areas, seems to be very relevant in this business context.

5.2 Limitations of the study and suggestions for future research

As other studies, the present study has some flaws. First, this study was performed based on a qualitative methodology used to collect and analyse the sample data, which in itself could be a limitation. It may be interesting to use other types of research

methodology, such as questionnaire surveys, in order to complete the data obtained, obtaining a more significant sample. Secondly, the company is specific to one sector of activity and results may not hold in other companies and/or in other industries. Cork Supply has its own specificities and is from the cork Portuguese sector. The 13 interviewees are employees of this company which means also the sample has limitations, despite representing the "general feeling" of the company.

Another gap that can be pointed out is due to the fact that this present study analyses the most consensual and discussed factors in the literature but left aside other factors that may explain the success in the implementation of a CRM system. In future studies, it may contribute to the literature understand the impact of other factors, to have an even more complete and valuable analysis.

Another limitation is the lack of customer view into the study. It would be interesting to study the impact of the CRM strategy into the customer experience.

Finally, it may be interesting to explore the impact of communication in an organization of the CRM strategy implementation, since it was one of the subjects quite often approached during the interviews.

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