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An investigation of the user satisfaction of customer relationship management program

Abstract

The thesis investigates user satisfaction for Microsoft Dynamics CRM 2011 by conduction surveys to graduate level students. The training manual was developed to guide the way to follow instructions to create an order and an invoice.

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Department Computer Information Systems

First Advisor Dr. Huei Lee

Second Advisor Dr. Sock Chung

Third Advisor Dr. Laverne Hairston Higgins

Keywords Microsoft Dynamics CRM, user satisfaction survey for Microsoft Dynamics CRM, user experience

Subject Categories Databases and Information Systems

AN INVESTIGATION OF THE USER SATISFACTION OF CUSTOMER RELATIONSHIP MANAGEMENT (CRM) PROGRAM

By

Sangeun Lee

A Senior Thesis Submitted to the Eastern Michigan University Honors College in Partial Fulfillment of the Requirements for Graduation with Departmental Honors in <u>Computer Information Systems</u>

Approved at Ypsilanti, Michigan, on this date April 14th, 2014

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Project Supervisor

I would like to appreciate the project supervisor Dr. Huei Lee's supervise. He assisted me with entire thesis from developing ideas and conducting surveys to concluding my thesis. By virtue of your supervise, I was able to finish the thesis successfully.

Dr.Huei Lee

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Introduction

In the today's world, customer relationship management is one of the primary segments when doing business. In the perspective of customers, they have a plenty of options. Unless companies strive hard to make the customers come back to their products, they might not buy the same product. Furthermore, if there is a better product available in the market, customers would buy the better product. Therefore, competition between companies is fierce. In addition, it was found out that CRM's market size increased by 12.5% over 2011 (Columbus, 2013).

In 2013, CRM Switch organized a survey of 752 employees working in the U.S. based companies. The survey provided market share of customer relationship management (CRM) programs. As a result, Microsoft Dynamics CRM is ranked the second highest and constituted 20% of CRM programs. The highest program was Salesforce by 39.8%. Other major competitors included Oracle, SAP, SalesLogix and so on. Microsoft Dynamics CRM was used widely throughout companies with one to 100 employees. The proportion of MD was lower in bigger companies. In other words, this means that MD is a great tool for small-sized companies.

Microsoft Dynamics CRM is a tool that allows companies to manage their customers efficiently. There are three criteria for CRM, which are sales, marketing and project management. In addition, it is composed of three modules, which are Sales, Marketing, and Service. The primary module in Microsoft Dynamics CRM is Sales, since it manages the entire sales process. With sales data, employees can utilize Marketing module and Sales module.

Purpose

The primary purpose of this thesis is to study user satisfaction of CRM software. The secondary purpose of the thesis is to investigates how to design a training manual for students or employees when using Microsoft Dynamics CRM. The research method I used is utilizing the measurement of user satisfaction survey in the design process to improve the training manual. The measurement tools used in the thesis are based on the Technology Acceptance Model (TAM) (Venkatesh et al., 2003).

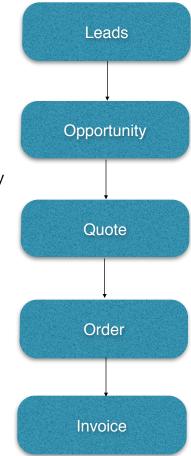
Next paragraph, I will discuss Sales module in Microsoft Dynamics CRM.

Sales Module in Microsoft Dynamics CRM

Sales part in Microsoft Dynamics CRM (2013) allows users to manage their customers coordinately. By depending on the number of people who want to access the data in CRM, companies can issue multiple user ids and passwords in the company's server. Therefore, employees have better accessibility and visibility of the data. There are some discussion about training in Microsoft Dynamics CRM such as Kao, Chen, Lee (2012) and Venkatesh et al.(2003).

Figure 1 is a representative sales process in Microsoft Dynamics CRM. First of all, a lead has to be created. The lead is a potential customer. Every lead includes a topic which explains why the customers is the lead. Second, an opportunity is created by qualifying the lead. By depending on the topic, stating opportunity products is beneficial. Third, a quote is developed by the data entered in the opportunity. Fourth, an order is placed if the customer decides to buy the product based on the provided quote. Finally, an invoice is made.

The subsequent handout was provided as a training manual. 40 graduate level students participated in the survey after completing the handout. Participants and the survey are explained in research methods (Page 25).



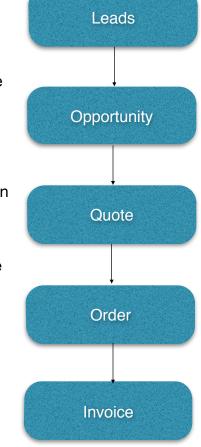


Training Manual

How to manage Sales module in Microsoft Dynamics CRM

Microsoft Dynamics CRM 2011 is the software for enterprise resource planning (ERP) and customer relationship management (CRM). It is composed of four modules which are Workplace, Sales, Marketing and Service.

The objective of this handout is to follow the process of sales in CRM. CRM's Sales module is composed of 15 parts, and five steps will be used to place an order and create an invoice. The five steps are lead, opportunity, quote, order and invoice. You will start from creating your lead, then an opportunity, a quote, an order and an invoice.



For this handout, you are expected to run Sales module and answer short answer questions. Ultimately, you will fill out the survey based on your experience on Sales module. 1. Log on to <u>http://50.241.208.85</u>

Your UserID and Password will be provided.

* Before you start, make sure pop ups are not blocked.

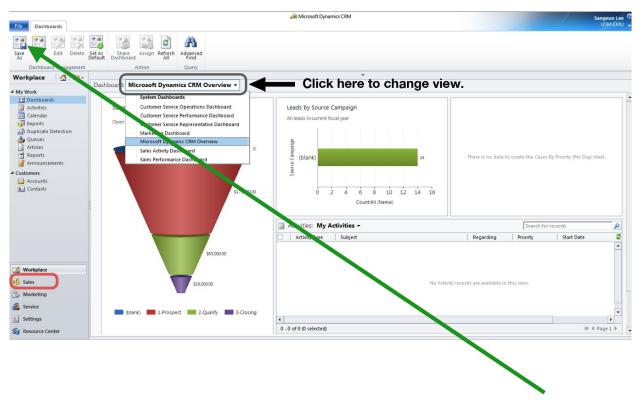
Follow these steps if they are blocked. (Microsoft Dynamics CRM, 2012).

- Internet Explorer 7, Internet Explorer 8, and Internet Explorer 9
- Click the Tools icon (it resembles a mechanical gear), and then click Internet Options.
- Click the Privacy tab, and in the Pop-Up Blocker area, click Settings.
- In the Address of website to allow box, type the URL that you use to access Microsoft Dynamics CRM. Your Microsoft Dynamics CRM URL will end in "dynamics.com".
- Click Add, and then confirm that the URL has been added to the Allowed sites box.
- Click Close, and then click OK. For the changes to take effect, restart your browser.

(Solution from Microsoft Dynamics CRM website)

2. When you log in, you will see Dashboard, which looks like following. Click on Sales, which is on the bottom left side of the screen.

Tip) You can always change view of the list by clicking as following.



3. Then, you will see Leads in Sales module.

Leads

Leads are referred as potential customers who can be either qualified or disqualified.

These leads are not in your contacts and accounts yet. By qualifying Leads, you can add them on contacts, accounts and opportunity. Lead is important, since it can be converted to opportunity. When leads are converted, they are qualified.

Let's start from opening the list of Leads.

File Leads View Ch	narts Add Customize	All Microsoft Dynamics LHM	Sangeun Lee 🕑 USM-EMU 🔦
New Edit Activate	Aerge Detect Duplicates - Qualify Send Direct Add to	tarteting Connect: Assign ⊕ Email a Link ↓ Wonflow Dailog ⊕ Emort Dails ↓ ⊕ Emort base ⊕ Filter Assign ⊕ Emort base ⊕ Filter Assign ⊕ Emort base ⊕ Filter Base ↓ Filter Bas	d
Records	Actions	Collaborate Process Data	
Sales 🚺 🙀 -			4=
a Leads	Leads Open Leads -	 Click here to change view to Open Lead 	Sigh for records
Opportunities	Name	Topic Status Reason Created On 🔻	2 <
Accounts	Sandy Beach	Showed interest at December 2013 New 3/14/2014 1:03 PM	1
 Contacts Marketing Lists 	Scott Konersmann (sample)	Interested in our newer offerings (s New 7/21/2013 9:03 AM	Click
Competitors	Robert Ahlering (sample)	Some interest in our products (sam New 7/21/2013 9:03 AM	* - -
Products	Paul Alcorn (sample)	Likes our products (sample) New 7/21/2013 9:03 AM	here to
Sales Literature	🔲 🥎 Oscar Alpuerto (sample)	Follow-up with information regard New 7/21/2013 9:03 AM	5
Quotes	🕅 🍓 Orlando Gee (sample)	Store is expanding - send new liter New 7/21/2013 9:03 AM	iew
Orders			view the
🔒 Invoices 谷 Quick Campaigns			chart
 Goals 			r.
Goal Metrics			
Rollup Queries	-		
	-		
			1
Workplace			
Sales	1		
Marketing			
Service			
E Settings			
-	1 - 6 of 6 (0 selected)		H ≪ Page1 >
Resource Center	All # A B C I) EFGHIJKLMN OPQR	STUVWXYZ

As changing the view in Dashboard, you can change the view to 'Open Leads' by doing like above. Then, click on the New button on the ribbon menu. (it is marked on above screen shot)

4. Enter information about a lead. Make sure you enter Topic, First and Last name, and Company name. The topics are customers' issues such as showing interest in products, liking our products, expanding stores and so on.

File Lead Add Custo	mize	Ait Microsoft	Dynamics CRM			Sangeun Lee 🥝 USM-EMU 🚕
Save & New Save & Save & New Save & Close Save	Add to Marketing Conne ist Colli	ct Assign Bernail a Link W	Run Vorkflow Process	Run Report - Data		
Information General Details Notes & Activities Preferences	Lead New Lead Source		Rating Warm		Leads Owner & Sangeun Lee	▼ 4 ₹
Related	▼ General Topic*	Channel Internet in a surger durit				_
 Common Activities Colsed Activities Connections Documents Audit History Marketing Lists Campaigns Processes Workflows Dialog Sessions 	Salutation First Name * Last Name * Job Title Company Name * Web Site E-mail Address	Shows interest in our product Maria Stravinsky Procurement manager Eagle Technologies http://www.eagletech.com m.stravinsky@eagletech.com		Business Phone Home Phone Mobile Phone Fax Other Phone Pager	734-222-3333	
🔚 Ulaiog Sessions	Street 1 Street 2 Street 3 City Description	Open		State/Province ZIP/Postal Code Country/Region		

5. When you are done entering, click on Save&Close.

Then, you can see the new lead on the list.

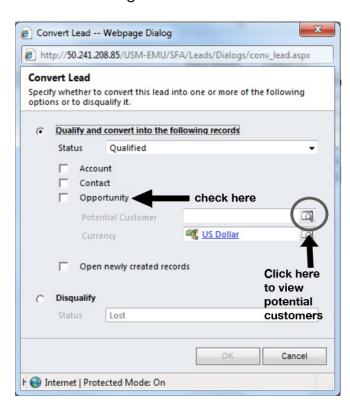
	Name	Topic	Status Reason	Created On 🔻
۵.	Maria Stravinsky	Shows interest in our product	New	3/16/2014 9:06 PM
- 🍋	Sandy Beach	Showed interest at December 2013	New	3/14/2014 1:03 PM
- 🗞	Scott Konersmann (sample)	Interested in our newer offerings (s	New	7/21/2013 9:03 AN
i 🍋	Robert Ahlering (sample)	Some interest in our products (sam	New	7/21/2013 9:03 AN
- 💫	Paul Alcorn (sample)	Likes our products (sample)	New	7/21/2013 9:03 AN
- 🍋	Oscar Alpuerto (sample)	Follow-up with information regard	New	7/21/2013 9:03 AN
- %	Orlando Gee (sample)	Store is expanding - send new liter	New	7/21/2013 9:03 AN

How can we convert the new lead (Maria Stravinsky) to an opportunity? Before figuring it out, there are other options as well. Click on the check box for the lead to see options on ribbon menu.

File Leads View Char	rts Add Customize		,		USM-EMU A
New Edit Activate	rrge Detect Duplicates +	Send Direct Add to Marketing Connet Assign 🔂 E-mail a	Dura Start Dura	Import Data	ed .
Records	Actions	Collaborate	Process	Data	
Sales 🛛 🚮 📴 -			*		
a Leads	Leads: Open Leads	•			Search for records
Opportunities	Name	Topic	Status Reason Cre	eated On 🔻	Ø <
	Maria Stravinsky	Shows interest in our pr	oduct New	3/16/2014 9:06 PM	
S Contacts	🔲 🍋 Sandy Beach	Showed interest at Dece	mber 2013 New	3/14/2014 1:03 PM	Click
Arketing Lists	🔲 🍋 Scott Konersmann	(sample) Interested in our newer	offerings (s New	7/21/2013 9:03 AM	Ř.
Competitors	🔲 🖏 Robert Ablering (s	amnle) Some interest in our pro	ducts (sam New	7/21/2013 9:03 AM	her

What are other possible options on ribbon menu? (Write at least 3)

6. For now, click on **Qualify** on ribbon menu to convert a lead into an opportunity. (Qualify button on looks like the image on right.) Then, you will see following window.





7. Like the screenshot above, check on Opportunity and choose potential customer by clicking on look up button. There are some sample customers. Check on whichever customer you want.

	p Record Webpage Dialog 50.241.208.85/USM-EMU/_controls/lookup/lookup/	nfo.aspx?AllowFilterO	ff=1&DefaultType=1&Defau				
	PRecord r search criteria and click Search to find matching rec y using the View options. Then, select the record you		s and view different columns				
Look for: Account							
	Account Lookup View Search for records						
	ccount Name	Account Number	Primary Contact				
🗆 🕒 D	esigner Goods (sample)		Eva Corets (sample)				
	lue Company (sample)		Forrest Chand (sample)				
	emental Goods (sample)	ABCO9M32	Gabriele Cannata (samp				
	rand Store (sample)		George Sullivan (sample				
	tware Inc. (sample)	BABCO88H	Marco Tanara (sample)				
	lagnificent Store (sample)	BOBC3J9U	Patrick Steiner (sample)				
	ecreation Supplies (sample)	BAK8JYGF	Susan Burk (sample)				
	nusual Store (sample)	BTBS3G34	Thomas Axen (sample)				
	ariety Store (sample)	BBA38GHT	Yvonne McKay (sample)				
	ractical Supply Company						
	dended Sales		Teresa Atkinson (sample				
🗆 🗁 S	uperlative		Stephanie Conroy (samp 🕶				
•	23 (1 selected)		H ◀ Page 1 ►				
Propert	es <u>N</u> ew						
		<u>o</u> ĸ	Cancel Remove Value				
http://50.2	41.208.85/USM-EMU/_con 🤤 Internet Protected I	Mode: On					

8. Click OK, then you will go back to the previous dialog, which is qualified lead. When it is converted, ribbon menu is deactivated like following. Also, you will see 'Reactivate Lead' button instead of 'Qualify' button on ribbon menu.

File	Lead	Add Custor	nize				مر Microsoft Dyna	mics CRM					Sangeun USM-	Lee EMU	۵
Save	Save & Close	Save & New	Reactivate Lead	Add to Marketing List	Connect	Assign	💭 Sharing ▾ 🛃 Copy a Link 🗑 E-mail a Link	Run Workflow	Start Dialog	Run Report -					
	Sa	/e	Actions		Collab	orate		Proc	ess	Data					
	eral	ities		Lead Austin Smit Lead Source	:h		Ratii Wa	-			Owner Sangeun L	eads	•	☆ 4	*
Relate	d		▼ Gen	eral											^
⊿ Comr	non		Topic	*	Likes our j	products			50						
	Activities		Saluta	ation					Busi	ness Phone	734-333-3333				
	Closed Ac Connectio		First I	Name +	Austin				Hor	ne Phone	734-333-3333				

9. Click on OK to confirm that you convert the lead.

10.

Opportunity

After converting lead into an opportunity, we need to make sure that the opportunity is won so that it can converted into a quote. Go to 'Opportunity', and choose the view 'Open Opportunities'. Then, you can see a list like following.

Sales	🕼 📭 -				*						
Leads		Opportunities: Open Opportunities -									
Opportunities		Topic Topic	Potential Customer	Est. Close Date 📥	Est. Revenue	Probability	Rating	E-mail (Potential Customer)	2 ·		
🕒 Accounts		🗌 💣 Likes our products	A Store (sample)				Warm				
Sea Contacts		Opening a new store	Backhanded Complements				Warm	_	5		
Marketing Lists Competitors		Shows interest in our product	Variety Store (sample)				Warm				
Products		🗆 💣 won	Unusual Store (sample)				Warm	-	<u>e</u>		
Sales Literature		🕅 💣 Mailed an interest card back (sample)	A Store (sample)				Hot		8		
Quotes		🕅 💣 New store opened this year - follow up (sample)	Extended Sales				Warm				
Orders		🗐 💣 Interested in online only store (sample)	Superlative				Warm		-		
Invoices		🖂 💣 Good prospect (sample)	F S Boutique				Cold		-		
Quick Campaigns Goals		🗆 💣 very interested in buying the product	Eva Corets (sample)				Warm	someone_f@example.com			
Goal Metrics		🔲 💣 asked for information at trade show	The Athlete's Foot				Warm				
Rollup Queries		🔲 💣 Will expand their offerings to include some of our pro.	Variety Store (sample)	8/5/2013	\$150,000.00	75	Hot				
		🗆 💣 Will order some items soon (sample)	Variety Store (sample)	8/6/2013	\$30,000.00	10	Cold				
		🗇 💣 6 orders of Product SKU JJ202 (sample)	Basic Company (sample)	8/22/2013	\$10,000.00	90	Hot		1		
		🔲 💣 Needs to restock their supply of Product SKU AX305; wi	Best o' Things (sample)	10/19/2013	\$25,000.00		Hot				
		🔲 💣 Very likely will order 18 Product SKU JJ202 this year (sa	. Elemental Goods (sample)	11/22/2013	\$30,000.00		Hot				
		🗆 💣 They sell many of the same items that we do - need to f	Blue Company (sample)	12/25/2013	\$26,000.00	95	Hot				
		Will be ordering about 110 items of all types (sample)	Litware Inc. (sample)	1/23/2014	\$25,000.00	80	Hot				

The opportunity called 'Shows interest in our product' is the converted lead. Click on it,

then you will get a screen like following.

If you have hard time finding your converted opportunity, select view as My Open

Opportunities like following. Then, find your topic and open the window to make sure it

is the opportunity that you converted from your lead.

11. Click on the topic and you will see the window like following.

File Opportunity Add	Customize	Microsoft Dynamics CR	М	Sangeun Lee 🥝 USM-EMU 😞
Save & New X Delete Save Save & Save	Close as Close as Recalculat Won Actions	e Connect Assign Copy a Link Wo Collaborate	tun Start rkflow Dialog Process Data	
Information General Line Items Notes & Activities Quotes	Opportunity Likes our p Potential Custome A Store (sa	er Est. Revenu	e	Opportunities 💌 🛊 🏺 Est. Close Date
	General Topic* Potential Customer* Description	Likes our products A Store (sample)		^ ^
	Forecast Informati			~
Orders Invoices Competitors Processes Workflows Dialog Sessions	Revenue Est. Revenue Est. Close Date Currency *	System Calculated User Provided	Probability (%)	Warm V
	Line Items Price List Existing Produ	Here is Line Items	Click on thi	s button to
	0 - 0 of 0 (0 selected)		uct records are available in this	view. I∢ ◀ Page 1 ▶
	Discount (%) Discount Freight Amount	[[s [s	Product Totals Pre-Freight Amount	\$ 0.00 \$ 0.00
	Total Tax Status	\$ 0.00 Open	Total Amount Pipeline Phase	\$ 0.00

File Opportunity Add	Customize							USM-EMU
Save & Save & New Save & Save & Close	Close as Close as Recalculate Opportunity	Connect Assig	Sharing → Image: Copy a Link Image: Copy a Link I	Run Workflow	Run Report -			
Save	Actions	Coll	aborate	Process	Data			
Information General Line Items Notes & Activities Quotes Output	Opportunity Shows interes Potential Customer Potential Customer		duct Est. Reven	ue		Est. Close Da	Opportunities te	•
L Preferences	▼ General							
Related	Topic* Sh	ows interest in our	product					
 ✓ Common ② Activities ③ Closed Activities ③ Relationships ④ Connections ④ Documents ④ Audit History 	Potential Customer *	<u>Variety Store (sam</u>	ple)					
▲ Sales	Forecast Information							
Invoices		System Calculated	C User Provided					
▲ Processes	Est. Revenue			Probability	(%)			
🐝 Workflows 📰 Dialog Sessions	Est. Close Date			🔁 🗸 Rating		Warm		•
in blang sessions	Currency*	US Dollar		Q				
	Line Items Price List							
	Existing Product		Write-In Product		Price Per Un	it Quantity	Extended	d Amou 🔁
				uct records are availa			- Children	

12. Now, we will add Line Items. You can view it by <u>scrolling down</u> in the current opportunity page. Before adding line item, we need to select price list. You can choose price list by clicking a button like the following screen.

Then, it will open Price List dialog.

Look Up Record Webpage Dialog		×
4 http:// 50.241.208.85 /USM-EMU/_contro	ls/lookup/lookupinfo.aspx?AllowFilterO	ff=1&DefaultType=1022&D
Look Up Record Enter your search criteria and click Search to fi by using the View options. Then, select the rec		view different columns of dat
ook for: Price List	~	
View: Price List Lookup View	\checkmark	
Search: Search for records	Q	
Name 🔺	Currency	4
Tennis Items	<u>US Dollar</u>	
1 1 of 1 (1 selected)		ld d Dags 1
1 - 1 of 1 (1 selected)		H ◀ Page 1 ▶
Properties <u>N</u> ew		
	<u>O</u> K	Cancel Remove Value
ttp://50.241.208.85/USM-EMU/_con 🏐 In	ternet Protected Mode: Off	

Check on Tennis Items and click OK.

Then, save this by clicking on the Save button on ribbon menu.

13. Now you will see the screen like following:

	Li	st Tools 🛛 🔺	Microsoft Dynamics CRM				eun Lee
File Opportunity Add	Customize Opport	inity Products				0	SM-EMU
	'Add	duct Copy a Link E-mail a Link ick on New Opportun Collaborate	Filter Set As Defau	Pane - Workflow	Dialog Report -	port Opportunity Products	
Add New Opportunity Product							
Add a related Opportunity Producto to this record.	5110 W3 111	terest in our pr				Opportunities	▼
- Notes & Activities	Potential Cust	omer Store (sample)	Est. Revenue		Est. Close Date	2	
- Quotes		1- 1-					
└─ Preferences	Est. Close Date	,		Rating	Warm		•
Related	Currency *	us Dollar					
⊿ Common		~	•	Click on this l	box		
Activities	Line Items						
Relationships	Price List		Q	JL			
Sonnections	Existing P	oduct 🔺	Write-In Product	Price Per U	Jnit Quantity	Extended A	Amol 😂
Documents Audit History			No Opportunity Product recor	ds are available in this v	riew.		
⊿ Sales	0.0.0000.000	D				ld d Dee	. 1 . 6
Orders	0 - 0 of 0 (0 selec	(ed)				M 🖣 Pag	e1 🕨
Invoices	Discount (%)			Product Totals	\$ 0.00		
-	Discount	S		Pre-Freight Amount	\$ 0.00		
Processes Workflows	Freight Amount	S					
Dialog Sessions	Total Tax	\$ 0.00		Total Amount	\$ 0.00		
	Notes & Activity	ties					
	▼ Quotes						
	Name 📥		Status	Total Amo	unt Created On		3
			No Quote records are a	available in this view.			

14. As shown above, click on the box to add new opportunity product.

You will get a following screen. (If it says to save before adding a product, click on

Save)

File Opportunity Product	Customize	USM-EMU 😞
Save & New Save & Save & New Save & Close Save	Collaborate Process Data	
Save Information General Related A Common M Audit History A Vorkflows M Orkflows Dialog Sessions	Collaborate Process Data Opportunity Product New Select Product Existing Write-In Select Product * Write-In Write-In Product Existing Product * Image: Collaboration of the select of the selec	Opportunity Prod V 🖈

15. Choose 'Existing Product' that the customer is interested in, choose right 'Unit',

and enter 'Quantity'.

Choose as following.

Field	Value
Existing Product	All-Pro Tennis Racket
Unit	1 Racket
Quantity	Any number you want. For example, 100

16. Save and Close.

Now you will be back on Opportunity screen.

17. Click on Opportunity tab, and Recalculate Opportunity since we entered the product and quantity. Then, it will recalculate Estimated Revenue (Est. Revenue on the screen) and will be shown on the screen (make sure you choose 'System Calculated', not 'User Provided). When you are done, save.

File Opportunity Add	Customize	USM-EMU a
Save & Save & New X Delete	Close as Clo	n Start Run flow Dialog Report
Save		Process Data
Information - General - Line Items - Notes & Activities - Quotes - Preferences	Popport Recalculate Opportunity Show Recalculate the amount of this Opportunity to reflect updates or changes. Potentia Yariety Store (sample) Standard \$1,900.00	Opportunities 🔻 🛊 🏺 Est. Close Date
Related	Topic * Shows interest in our product	
Common Activities Closed Activities Relationships Connections Audit History Sales Sales	Potential Customer * 🔛 <u>Variety Store (sample)</u>	
Orders	Forecast Information	
 Invoices Competitors 	Revenue O System Calculated O User Provided)
▲ Processes	Est. Revenue \$1,900.00	Probability (%)
🤹 Workflows 📰 Dialog Sessions	Est. Close Date	Rating Warm 👻
Dialog Sessions	Currency* 💐 <u>US Dollar</u>	
	▼ Line Items Price List Line Tennis Items	
	Existing Product Write-In Product	Price Per Unit 🔋 Quantity 👘 Extended Amou 🥰
	🕅 👸 All-Pro Tennis Racket	\$19.00 100.00000 \$1,900.00
	Status Open	Pineline Phase

18.

Quote

When the opportunity is recalculated, click on '**Quotes**' under <u>Information</u> on the left side bar. Then, you will get the following screen.

File Opportunity Add C	ustomize Quotes						USM-EMU
Add New Eliti	Send Direct E-mail	t 🗸 🔊 Share Share Copy a Link Assign Quotes 🔓 E-mail a Link	Filter	Set As Default View	Run Workflow	Run Report - Quotes	
3 Records	Col	laborate	Current View	View	Process	Data	
Information – General	Opportunity Shows inter	est in our product				Opportunities	▼ 1
- Line Items	Potential Custome	er	Est. Revenue		Est. Close I	Date	
- Notes di Acimities	🕒 Variety Stor	e (sample)	\$1,900.00				
Related	Quotes Name		Sta	atus 🔰 Total A	mount created	On	S
Activities Closed Activities		No	2 ote records a	are available in this view.			
👌 Closed Activities 🚳 Relationships	0 - 0 of 0 (0 selected)					N 4	Page 1 🕨
Documents	• Preferences	Sangeun Lee			Sh. Maria Stravic		
▲ Sales		a	ā	Originating Lead	Maria Stravir	ISKY	
✓ Sales Orders Invoices	Status Reason	In Progress	•	Source Campaign			ą

19. Click on the grid to add a new quote, and click on **Add New Quote**. As soon as you click on the button, it will lead you to another page which looks like following.

File Quote Add Cust	omize								USM-EMU
Save & New X Delete	Look Up Recalculate G Address	et Print Quote for Customer	Create Order Quote	Revise	Close Quote	Connect	Assign	Link 💟 🏣	Run Report -
Save		Actions					Collaborate	Process	Data
Information - General	Quote Shows inte	erest in our pro	oduct					Quotes	* 1
- Shipping - Addresses - Administration - Notes	 ▼ General Quote ID * 	QUO-01006-H5Y9D5			Rev	ision ID *	0		
Related Common Products	Name * Potential Customer * Price List *	Shows interest in ou <u>Variety Store (sa</u> <u>Tennis Items</u>				rency *	its Do	llar	
 Other Contacts Activities Closed Activities Connections Documents 	Totals Detail Amount Quote Discount (%) Quote Discount	\$1,900.00]]]				
Audit History Processes Workflows Dialog Sessions	Pre-Freight Amount Freight Amount Total Tax	\$ 1,900.00 \$ \$ 0.00							
	Total Amount	\$1,900.00							

Make sure you click on 'Save'.

Now, go to the quote screen like following.

File Quotes View C	narts Add Customize	Microsoft Dynamics CRM	Sangeun Le USM-EMU
New Edit S	end Direct Connect Assign Remail a Link Workflow Dir		
Records	Collaborate Process	Data	
ales 🛛 🚮 📴 -			
Leads	Quotes: All Quotes -		Search for records
Opportunities	Name 🔺	Status Total Amount Potential Customer E-mail (Pot	tential Customer) Created On
Accounts	aatopic	Won \$0.00 Some Co	3/26/2014 10:42 AM
Contacts	BlaBla	Won \$4,750.00 Some Co	4/1/2014 7:10 PM
Marketing Lists	hello there	Won \$190.00 Variety Store (sample)	3/25/2014 9:00 PM
Competitors	interested in our product	Won \$190.00 Some Co	4/1/2014 7:04 PM
Products Sales Literature	Intrest in product-now	Won \$19.00 Basic Company (sample)	4/1/2014 7:03 PM
Quotes	Likes our products	Draft \$1,900.00 A Store (sample)	4/8/2014 2:50 PM
Orders	Likes product	Won \$190.00 Some Co	4/1/2014 7:18 PM
Invoices	Liking our product	Won \$114.00 Grand Store (sample)	4/1/2014 7:02 PM
Quick Campaigns	Liking products	Won \$57.00 Elemental Goods (sample)	4/1/2014 7:06 PM
Goals Goal Metrics	Might be interested	Won \$95.00 Co	4/1/2014 7:01 PM
Rollup Queries	Dening a new store	Won \$55.00 Backhanded Complements	3/14/2014 2:08 PM
	opening a new store	Won \$100.00 The Merchant of Tennis	2/25/2014 11:25 AM
	Potential Interest from Customer	Won \$38.00 Sports Authority	4/1/2014 6:55 PM
	Really interested in a product	Won \$19.00 Superlative	3/25/2014 8:37 PM
	showed interest	Won \$0.00 Be a Good Sport	2/25/2014 11:07 AM
	Showed interest at convention	Won \$222.00 Sports Authority	3/26/2014 9:37 AM
	🗐 🛃 Shows interest in our product	Won \$95.00 Bill Board	3/25/2014 8:39 PM
	📰 🗟 Shows interest in our product	Won \$1,900.00 Variety Store (sample)	3/25/2014 8:53 PM
Workplace	🗐 🗟 Shows interest in our product	Won \$969.00 Magnificent Store (sample)	3/25/2014 8:55 PM
Sales	🗐 🗟 Shows interest in our product	Won \$1,900.00 Variety Store (sample)	3/25/2014 8:57 PM
Marketing	🗐 🗟 Shows interest in our product	Draft \$19.00 F S Boutique	3/25/2014 9:01 PM
	🗐 🗟 Shows interest in our product	Won \$95.00 Adrian Dumitrascu (sample) someone_a	a@example.com 3/25/2014 9:04 PM
Service	Shows interest in our product	Won \$19.00 F S Boutique	3/25/2014 9:05 PM
Settings	1 - 39 of 39 (0 selected)		4 ¶ Page 1 ▶
Resource Center	All # A B C D E	FGHIJKLMNO	P Q R S T U V W X Y Z

Before converting the quote into the order, choose and check the quote you made in

the previous step. Double click on your quote and you will see the following screen.

File Quote Add Cus	tomize	<u></u>	Microsoft Dynamics	CRM			San U	geun Lee 🔞 JSM-EMU 🚕
Save & New X Delete Save & Close	Look Up Recalculate C Address	Set Print Quote for Customer Actions	Create Activate R Order Quote	evise Clo	ose Connect	Sharing ↓ ↓ Sharing ↓ ↓ Copy a Link ↓ Copy a Link ↓ Copy a Link	Run Workflow Dialog	Run Report - Data
Save		Actions				Conaborate	Process	Data
Information General	Quote	products					Quotes	▼ ☆ ₽
- Shipping - Addresses - Administration - Notes	✓ General Quote ID * Name *	QUO-01043-Z0M9P2 Likes our products			Revision ID *	0		
Related	Potential Customer*	-			Currency *	us Dollar		
Common Products	Price List *	Tennis Items						
🔙 Other Contacts	Totals							
Activities Closed Activities	Detail Amount	\$1,900.00		_				
Sonnections	Quote Discount (%)							
Documents Audit History	Quote Discount	S						
Processes	Pre-Freight Amount	\$1,900.00						
G Workflows	Freight Amount	S						
Dialog Sessions	Total Tax	\$ 0.00						
	Total Amount	\$ 1,900.00						
	▼ Shipping							
	Dates							
	Effective From			•	Effective To			
	Requested Delivery Date			•	Due By			
	Shipping Informa	tion						
								-
	Status	Draft						

20.

Order

To make the quote into the order, first of all, you need to activate the quote. Click on

Activate button(1). Then, click on Create Order(2) to create an order like following

screen.

File	Quote Add Cust	omize								U	SM-EMU 🚕
Save Sav	■ Save & New ■ Save & New → Delete ave & Llose	Look Up Recalculate	Get Products Print Quot Custom	e of treate Activate order Quote	Bevise C	Liose Quote	ct Assign	🧊 Sharing → 👘 Copy a Link 📊 E-mail a Link	Run Workflow	Start Dialog	Run Report -
	Save		Actio	15			Colla	borate	Proce	55	Data

After following the steps above, you will get a following screen to enter details about the order.

🧃 Create Order -	- Webpage Dialog	_		×
//50.241.2	208.85/USM-EMU/sfa/quot	es/dlg_accept.aspx	QuoteId=%7bC?	4D09753-D64
Create Order Use this quote to	create an order.			
Quote ID:	QUO-01006-H5Y9D5	Revision ID:	0	
Status Reason	Won 👻			
Date Won	3/19/2014			
Description				
Close Opport	unity			
	ual revenue is: C S			
	Calculate	d from quotes		
C Don't update	opportunity			
			ОК	Cancel
http://50.241.208.8	😔 Internet Protected Mo	ode: On		

As soon as you create an order, the quote will be deactivated and the order will be activated.

21. Click on OK, and you will be lead to a new window for the order you just created. In

this window, click on 'Create Invoice' to create invoice. Create Invoice button is

marked in circle in the following screen.

22.

Invoice



File Order Add Custo	mize		🏄 Microsoft Dyna	mics CRM				Sangeun Lee 🥝 USM-EMU 🚕
Save & New Save & Close Save	Create Use Current	Fulfill Order Cancel Order Recalculate Actions	Get Products Look Up Address	Connect A	Sharing -	Run Workflow Dialog	Run Report - Data	
Information - General - Shipping	Create Invoice Create a new invoice ba order form.	ased on this	ır product				Orders	 ▼ ☆ 尋
Addresses Administration Notes Related Common Products	 ▼ General Order ID * Name * Customer * Price List * 		est in our product store (sample)		Currency*	💐 <u>US Dollar</u>		
Conter Contacts Activities Consed Activities Audit History Sales Invoices Vorkflows Dialog Sessions	Totals Detail Amount Order Discount (%) Order Discount Pre-Freight Amount Freight Amount Total Tax Total Amount	\$1,900.00 \$ \$1,900.00 \$ \$0.00 \$1,900.00			Prices Locked *			
	Shipping Dates Requested Delivery Date Shipping Informa Shipping Method Dumant Terms Status	tion			Date Fulfilled	[

What is difference between Order and Invoice?

Order:

Invoice:

Invoice: Shows interest in our p	oroduct - Microsoft Dynami	ics CRM - Windows Inter	net Explorer		and a state	-	- 21-	
🏄 http:// 50.241.208.85 /USM-EMU	J/main.aspx?etc=1088&ext	raqs=%3fetc%3d1088%26	5id%3d%257b5C418	ADE-D7AF-E311-	915D-4437E6B0EE57	%257d&pa	getype=entity	record
File Invoice Add Cus	tomize	🕌 Mi	icrosoft Dynamics CRN	1				Sangeun Lee 🥝 USM-EMU 🚕
Save & New Save & X Delete Save & Close Save	Invoice Paid	Look Up Address	Connect Assign	💭 Sharing ↓ 🏠 Copy a Link 🗑 E-mail a Link prate	Run Workflow Dialog	Run Report - Data		
Information - General - Shipping	Invoice	erest in our prod					Invoices	▼ ☆ ₽
Addresses Administration Notes Related Common Products Advivities	 General Invoice ID * Name * Customer * Price List * Totals 	INV-01004-G8Y1C5 Shows interest in our pr Variety Store (samp) Market Store (samp)	l <u>e)</u> [ব্র Currency ' ব্	. 📑 🛛	5 Dollar		
 A Closed Activities Connections A Audit History ✓ Processes ✓ Workflows ☑ Dialog Sessions 	Detail Amount Invoice Discount (%) Invoice Discount Pre-Freight Amount Freight Amount Total Tax Total Amount	\$1,900.00 \$ \$1,900.00 \$ \$0.00 \$1,900.00		Prices Loc	ked * 🗖			
	Shipping Dates Date Delivered Shipping Informat Shipping Method Payment Terms Status	Lion Active		v Due Date ▼				

23. Save and Close.

24. Now you are done with Sales process. Please fill out the survey.

Thank you very much!

Research Methods

When participants were done with running the program, they were asked to finish a survey. The survey included questions about participants' interest in MS CRM after following the instruction for Sales module, if the procedure of creating an invoice was easy to follow, the responsiveness of user interface, user experience of screen design, and comparison between MS CRM and Microsoft GP if participants have ever tried Microsoft GP.

According to Kao, Chen, and Lee (2012), "Video-clip instructions have an impact on perceived ease of use and perceived usefulness of customer relationship management (CRM) software for brand management."

For the first survey, the three questions asking basic information about participants were not included. However, starting from the second survey, more questions were added to analyze participants, and investigate the relevance between participants' traits and the result of the survey. The added questions asked the participants about their gender and degree level. The question asking if they have tried the instruction in the last week was also included, because for the first conducted survey there were some errors which would be discussed later in the thesis. Each question had five rating scales ranging from one to five. One refers to 'not at all' and five refers to 'strongly agree'.

Participants of the survey were 30 graduate students in Masters of Science in Information Systems (MSIS) and 10 graduate students with their majors in Supply

Figure 2. Survey Questionnaire

Chain Management (SCM) at Eastern Michigan University. Majority of MSIS students have experiences in supply chain programs and customer relationship management programs such as SAP, Microsoft GP and etc. SCM students relatively have less background about CRM programs. However, CRM processes are relevant to supply chain processes, which will make it easier for them to understand the flow of CRM better than MSIS students.

The Figure 2 on the next page is the survey questionnaire provided to participants.

Microsoft Dynamics CRM User Satisfaction Survey
Thank you very much for completing all steps in handout. Please fill out the survey.
* Required
Did you participate in the last week's survey?
Yes (This is my second time)
○ No (This is my first time)
What is your gender?
O Male
○ Female
Are you a undergraduate or graduate student?
Graduate
Microsoft Dynamics CRM was interesting to me. *
1 2 3 4 5
Not at all O O O Strongly Agree
The procedure of creating invoice was easy to follow. *
1 2 3 4 5
Not at all O O O Strongly Agree
The user interface of CRM was responsive. *
1 2 3 4 5
Not at all 🔘 🔘 🔘 🔘 Strongly Agree
The screen design was user friendly *
1 2 3 4 5
Not at all O O O O Strong Agree
The speed of CRM was fast enough. *
1 2 3 4 5
Not at all O O O Strong Agree
When compared to Microsoft GP, CRM is much easier to use Answer only if you have tried GP before
1 2 3 4 5
Not at all O O O Strongly Agree
Submit
Never submit passwords through Google Forms.

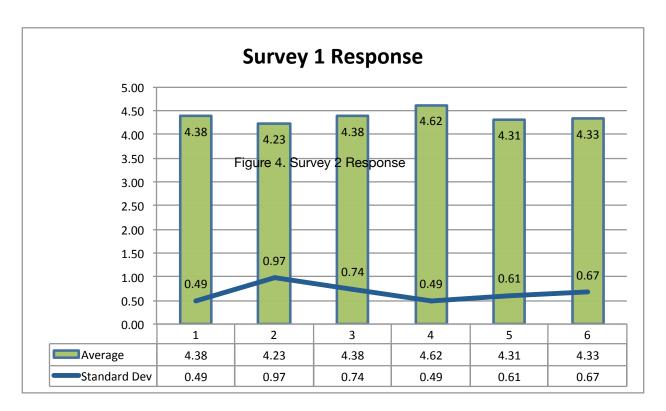
Research Results

Edit this form

1st Survey

The first survey was conducted on March 25th, 2014 during Dr. Huei Lee's Information Systems 627 class. There were 13 participants who are MSIS students at Eastern Michigan University.

Prior to conducting the survey, there were issues when logging into the system. The server was not working well, which made participants unable to log in. Each student was given a user ID and a password, so that each of them can try different input data.



Participants tend to respond with high score. The averages of each question ranged from 4.23 to 4.62, which means that they were satisfied with their experiences on Microsoft CRM. Although participants rated Microsoft CRM relatively high, there were complaints about the manual. Most of the complaints were printing errors occurred while converting the file and issues with popups. The errors were fixed in the second survey, however, the result was different from my expectation.

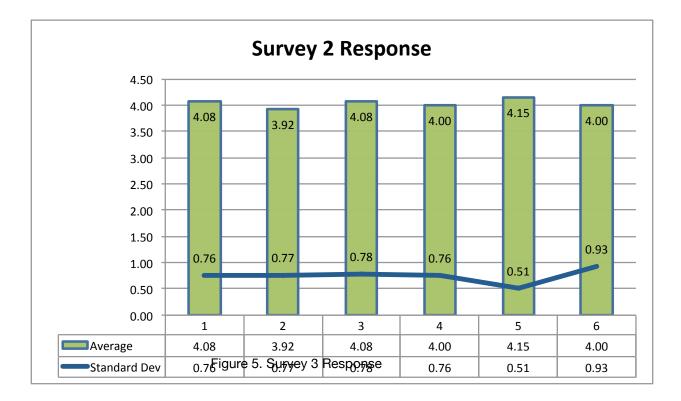
2nd Survey

The second survey was done to same participants as the first survey except for one participant. There were 17 participants in total, and most of the people who were not in the first survey In other words, they have already tried the instruction prior to the survey. I predicted that people would be more satisfied in the second survey than the first survey since errors were fixed according to participants' critiques.

The second survey was conducted on April 1st, 2014 to IS 627 students. To improve survey results, I participated in the class. It took 20 to 50 minutes for them to finish the survey. Some students asked me about minor questions related to manual, such as how to find a created lead.

Unexpectedly, user satisfaction decreased comparatively. The average of each question ranged from 3.92 to 4.15. My pre assumption was that people would be more satisfied since the popups were working well and some equivocal terms and figures

were fixed.



The figure above is the bar chart based on the average of survey 2 responses. The second question, which was asking the easiness of creating the invoice, got the lowest score. When the survey was done, there were a plenty of comments about the instruction. Rather than discussing how misleading the instruction was, most of the students suggested improvements. There were complaints about printing quality of instructions. However, this did not have a large impact on the survey.

When I reviewed the comments on the instruction, it was found out that participants' attitudes towards the survey was contrasting to their attitude towards the first survey. Particularly, they were more specific and intense in the second time than in the first time. As I attended the class for the second survey, it could have affected participants position. I perceived they were more engaging in the second survey.

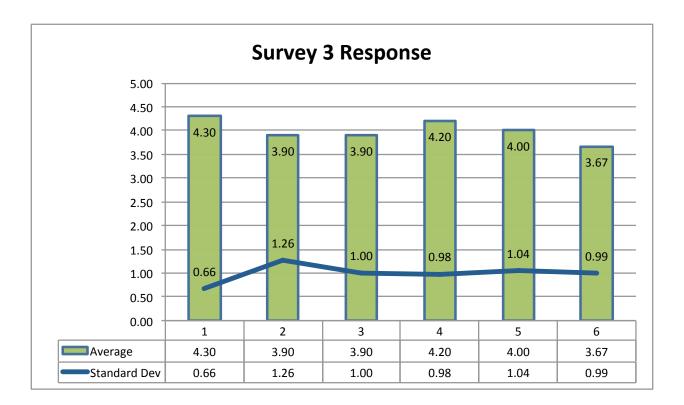
Therefore, I could conclude that the presence of the survey conductor has an effect on the result.

Running the identical survey more than once had more impact than I expected. For the second survey, it was inferred that participants had higher expectation. Annotations they left on training manual were highly critical. They were detecting every step that was unclear. Also, when people try out same material twice, they can notice some issues they could not notice before. Therefore, participants were able to figure out more about the program than the first time they tried it.

3rd Survey

The third survey was coordinated on April 9th, 2014 to 10 graduate students majoring in Supply Chain Management (SCM). The average of overall survey scores was higher than the second survey. SCM students have different backgrounds from MSIS students. They were familiar with sales processes as well as supply chain processes.

There was only one student who has tried Microsoft Dynamics CRM before. Most of the students have tried Microsoft GP before, which helped them with getting used to a new program. There were more students who were interested in Microsoft Dynamics CRM than the students participated in the second survey. However, they did not find it easy to follow the procedures in Microsoft CRM.



Conclusion

The survey provided some helpful insights into the training manual. It was inferred that the interaction was somewhat satisfying for graduate level students. The overall average for all questions was 3.76, which means that they were slightly satisfied with Microsoft Dynamics CRM.

According to User Acceptance of Information Technology (Venkatesh, et al., 2003), there are several key factors affecting behavioral intention and user experience. They were gender, age, experience and voluntariness of use. In contrast, factors affecting behavioral intention and user experience with the training manual I provided were majors (academic backgrounds) and previous experiences.

Participants were first divided into two groups sorted by their majors, then divided again into two more groups sorted by their prior knowledge with CRM. Students' majors were Information Systems (IS) and Supply Chain Management (SCM). Students with IS majors have strong program application backgrounds. Therefore, they were proficient at dealing with various programs which enabled them to be less anxious when running a new program. MSIS degree requires students to execute various information system related programs such as SAP, Microsoft GP and etc. Consequently, they were more familiar with running a different program.

Nonetheless, students with IS majors struggled with understanding the sales procedure. They did not have hard time understanding concept, but apprehending the process entirely was challenging for them. When I was participating in IS 627 class, I recognized that they were uncertain about the flow of the sales procedure. For instance, coming up with topics in a lead and choosing a product was demanding

unless exact data was provided.

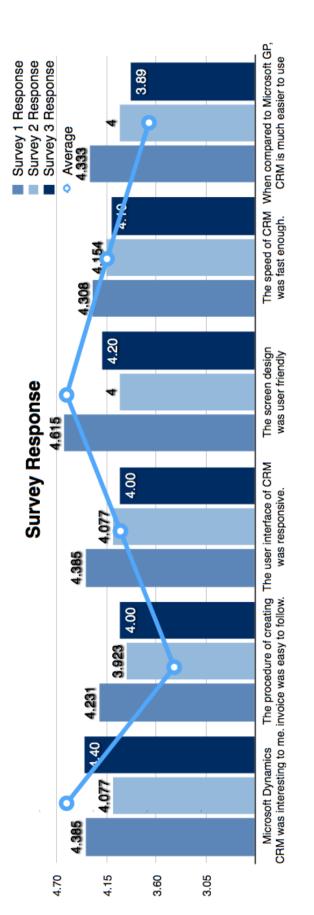
Students with SCM majors were stronger in understanding the procedure comprehensively. However, they were not familiar with executing a program they have never tried before. Only one student had tried Microsoft Dynamics CRM previously.

I concluded that both technical and theoretical aspects were needed when running a program successfully. Therefore, when Microsoft Dynamics CRM is provided to employees, they need to be familiar with handling unfamiliar programs and need to be taught underlying supply chain and sales processes.

The second group, which categorized participants into two groups by their previous experience with CRM, also provided an interesting insight. The participants' standpoints were different in the first survey and in the second survey. Since they have tried the same manual before, they gained more confidence in the second survey. Also, they were more engaging, as I could find significantly increased number of comments. Most of the comments were suggestions rather than detecting errors. There were some comments which were catching minor errors, but I could hardly find any major issues.

In the perspective of users, they want a program that can be used easily, responsive, and fast regardless of their backgrounds. I could observe that even students with computer related backgrounds wanted a program that is ease of use. As a result, prior to teaching employees Microsoft Dynamics CRM, employees need to understand related knowledge. They need to be acquainted with the Microsoft Dynamics CRM's definition of a lead, an opportunity, a quote, a order and an invoice. Microsoft CRM's terms are not contrasting from their original meanings but used in a different context.

Appendix A. Survey Responses Chart



		-	2	3	4	5	9	7	80	0
		Microsoft Dynamics CRM was interesting to me.	The procedure of creating invoice was easy to follow.	The user interface of CRM was responsive.	The screen design was user friendly	The speed of CRM was fast enough.	When compared to Microsoft GP, CRM is much easier to use	What is your gender?	Are you an undergradu ate or graduate student?	Did you participate in the last week's survey?
IS627										
-		2	'n	5	ŝ	2	2			
0		Ω.	5	5	2	2	5			
0		4	0	e	4	4	4			
4		4	4	С	4	ς,	e			
ŝ		4	4	4	Ω	4	4			
9		4	e	4	4	4	N/A			
1		4	'n	S	ŝ	2	4			
80		2	ŝ	5	4	4	N/A			
0		4	e	4	4	e	N/A			
10		4	ŝ	4	Q	4	ŝ			
ŧ		4	ŝ	S	Ω	4	4			
12		ŝ	4	S	Ω	4	N/A			
13		2	ŝ	5	2	5	5			
	Sum	57	55	57	60	56	39			
	Average	4.38	4.23	4.38	4.62	4.31	4.33			
	Standard Dev	0.51	1.01	0.77	0.51	0.63	0.71			
Participants	13									
IS627										
4		5	4	4	4	4	5	Male	Graduate	Yes (This is my second time)
15		5	4	5	2	5	N/A	Male	Graduate	Yes (This is my second time)
16		'n	ŝ	4	4	4	5	Male	Graduate	Yes (This is my second time)
17		4	4	5	2	4	6	Male	Graduate	Yes (This is my second time)
18		4	e	4	4	4	N/A	Female	Graduate	Yes (This is my second time)
19		4	4	4	2	e	4	Female	Graduate	Yes (This is my second time)
ຊ		4	ŝ	2	4	5	5	Female	Graduate	Yes (This is my second time)
21		e	4	4	ŝ	5	5	Female	Graduate	Yes (This is my second time)
22		4	4	4	4	4	4	Female	Graduate	Yes (This is my second time)
83		5	N	S	ŝ	5	e	Male	Graduate	Yes (This is my second time)
24		m	e	N	N	4	2	Male	Graduate	Yes (This is my second time)
25		4	ŝ	4	4	4	e	Male	Graduate	Yes (This is my second time)
26		Ω	ŝ	S	4	4	ŝ	Male	Graduate	Yes (This is my second time)
27		4	4	4	4	4	4	Female	Graduate	No (This is my first time)
28		5	4	5	4	4	4	Male	Graduate	Yes (This is my second time)
29		5	4	4	4	4	5	Male	Graduate	Yes (This is my second time)
8		'n	4	e	ũ	4	4	Female	Graduate	Yes (This is my second time)
	Sum	8	51	53	52	2	48			
	Average	4.08	3.92	4.08	4.00	4.15	4.00			
	Standard Dev	0.78	0.79	0.81	0.78	0.53	0.96			

Appendix B. Survey Results Table

SCM										
31		4	5	С	Q	5	N/A	Female	Graduate	No (This is my first time)
32		4	4	4	4	4	5	Female	Graduate	No (This is my first time)
33		5	ო	4	4	5	4	4 Female	Graduate	No (This is my first time)
34		4	4	4	4	e	e	3 Male	Graduate	No (This is my first time)
35		5	S	3	ß	5	5	5 Female	Graduate	No (This is my first time)
36		e	ო	0	CI	2	2	2 Female	Graduate	No (This is my first time)
37		4	S	S	Ω	4	4	4 Male	Graduate	No (This is my first time)
38		5	S	S	ß	5	e	3 Female	Graduate	Yes (This is my second time)
98		5	F	ю	e	e	4	4 Female	Graduate	No (This is my first time)
40		5	S	5	ŝ	5	5	5 Female	Graduate	No (This is my first time)
	Sum	44	40	40	42	41	35		0	0
	Average	4.40	4.00	4.00	4.20	4.10	3.89			
	Standard Dev	0.70	1.33	1.05	1.03	1.10	1.05			
Participants	10									
Total	40									
	Total									
	Sum	154	146	150	154	151	122			
	Average	3.85	3.65	3.75	3.85	3.78	3.70			

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