Customer Relationship Management as a Cloud Service

Empirical inductive analysis of Cloud CRM implementation using Salesforce as an example

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Abstract

Nowadays, companies must adapt to rapidly changing market situations. Technologies are constantly evolving and impacting the cutting-edge Customer Relationship Management (CRM) systems. By implementing modern cloud CRM systems like Salesforce, companies can adapt to changing customer needs, which can help gather and effectively use data about their customers and stay competitive in the marketplace. This thesis examines how companies have migrated their CRM systems to the cloud. It is based on the following three research questions: Which benefits and opportunities arise from the implementation of Salesforce? Which obstacles and risks are companies facing during the change process? Which actions should be taken to achieve a successful implementation? In answering them, it explains which benefits, opportunities, downsides, and obstacles are faced by clients and consultants by the conversion to Salesforce compared to the on-premises solutions used to date. In addition, recommendations for action that have positively influenced the implementation and are thus considered to point the way for other implementation approaches are identified. Based on the results of in-depth interviews, this thesis inductively derives empirical results. In addition, existing information and theories on cloud-CRM implementation are drawn upon to analyze and elaborate on the insights gained in the interviews.

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Resumo

Hoje em dia, as empresas sentem necessidade de se adaptar às situações de mercado em rápida mudança. As tecnologias estão em constante evolução e impactam os sistemas de última geração de Gestão de Relacionamento com o Cliente (GRC). Ao implementar sistemas modernos de GRC em nuvem, como o Salesforce, as empresas podem adaptar-se às necessidades emergentes dos clientes, o que pode ajudar a organizar e usar com eficácia os dados sobre os seus clientes e a permanecerem competitivas no mercado. Esta tese examina como as empresas migraram os seus sistemas de GRC para a nuvem. A tese baseia-se nas três questões de pesquisa a seguir: Quais benefícios e oportunidades surgem com a implementação do Salesforce? Quais obstáculos e riscos as empresas enfrentam durante o processo de mudança? Quais ações devem ser tomadas para alcançar uma implementação bem-sucedida? Ao respondê-las, explica que benefícios, oportunidades, desvantagens e obstáculos são enfrentados por clientes e consultores na conversão para o Salesforce em comparação com as soluções locais usadas até o momento. Para além disso, são identificadas recomendações de ações que influenciaram positivamente a implementação e, portanto, são consideradas para apontar o caminho para outras abordagens de implementação. Com base nos resultados de entrevistas, esta tese deriva indutivamente resultados empíricos. Para além disso, as informações e teorias existentes sobre a implementação do Cloud-GRC são utilizadas para analisar e elaborar os insights obtidos nas entrevistas.

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List of Abbreviations

CRM	Customer Relationship Management
IT	Information Technology
SaaS	Software as a Service
IaaS	Infrastructure as a Service
PaaS	Platform as a Service
IDC	International Data Corporation
AI	Artificial Intelligence
UAT	User Acceptance Testing
MVP	Minimum Viable Product
USP	Unique Selling Proposition
QCA	Qualitative Content Analysis

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1   Introduction

This chapter discusses the continuing importance of customer relationship management (CRM) and its current evolution due to digitalization. Furthermore, this chapter describes the context and structure of the thesis as well as the motivation and objectives of the thesis.

1.1   General Topic Overview

The Austrian-American economist Peter F. Drucker stated as early as the 1950s: "*The purpose of business is to create and keep a customer.*" (Drucker, 1954, p.37). At that time, he had previously emphasized the importance of a company's customer-centric business strategy. The significance of the strategy has continued, hence, nowadays, building and managing a strong relationship with customers is one of the crucial components to the success of any business over time. This approach is referred to as Customer Relationship Management (Day, 2000; Meena & Sahu, 2021).

As the business environment and technological developments continue to change at an accelerating pace, accompanied by increases in efficiency and effectiveness, contemporary business models are increasingly data-driven or incorporate more and more digitally decisive aspects (Avramakis, 2020). The modern customer is active on many different channels such as online and offline retail. To provide them with a good customer journey, companies need a 360° view of their customers, which means that all channels and the customer movements within these channels must be documentable and measurable for companies. This 360° customer view is the result of observing, measuring, and evaluating every customer touchpoint in the customer journey, if possible. Ideally, when all these touchpoints and channels are brought together, you get a holistic picture of how a lead or customer behaves on the journey along all buying stages. (Deufel, 2020). The establishment of a CRM system is the companies' top priority in order to enhance services, forge worthwhile connections, and keep key clients. They raise the customer retention rate by managing CRM through digital platforms (Azeem et al., 2021). Companies such as Salesforce offer such digital platforms that aim to simplify and digitalize CRM processes in the company.

According to existing literature, CRM has many different definitions, and an increasing amount of research is being conducted on this topic. The main goals of CRM are to enhance the company's efficiency and to improve the company's profit by reaching a competitive advantage in managing customers (AlQershi et al., 2021; Bhat & Darzi, 2016). Due to the digital

importance in business, currently CRM-Information Technology (IT) and software are major topics in the respective field (Kimiloğlu & Zarali, 2009; Meena & Sahu, 2021). Mithas et al. (2005) states that firms which invest in CRM applications have intangible benefits such as improved customer satisfaction and customer knowledge.

1.2 Relevance and Objective

The importance of a company's customer-centric approach, which Peter F. Drucker first discussed in the 1950s, is still highly relevant today. Due to the continuously changing market conditions and increasing importance of digitalization, it is essential for companies to adapt to the new reality (Blanchard, 2010). Therefore, acquiring current information and real-time data by customers is crucial. As previously mentioned, CRM-IT and -software are key topics in the field of retaining and managing new and existing customers. With a cloud-based CRM solution such as Salesforce, companies of all sizes can easily optimize work processes and bundle all data centrally. By digitizing their CRM processes, companies are going through a change management process from on-premises to cloud-based CRM.

Since the impact of such a change on business performance is not captured in existing literature, although several studies show a positive relationship between the customer relationship and business performance, this paper conducts an inductive analysis with the help of experts and customer interviews (Battor & Battor, 2010). Several findings can be derived on the basis of a qualitative study which will be elaborated on in the following parts. On the one hand, difficulties, and hurdles in the implementation of a cloud-based CRM system are to be identified and factors will be derived that facilitate such a change and implementation process. On the other hand, the results are intended to show the extent to which such a system is beneficial for the company. *The research questions that address the issues previously described are as follows:*

1) *Which benefits and opportunities arise from the implementation of Salesforce?*
2) *Which obstacles and risks are companies facing during the change process?*
3) *Which actions should be taken to achieve a successful implementation?*

The results of this work will provide answers to the above research questions and serve as a basis for possible future change by highlighting what companies should consider when implementing Salesforce, a cloud CRM system. The conclusions drawn can help companies weigh the benefits of Salesforce adoption with the difficulties and ultimately enable a successful transition based on the recommended actions.

1.3   Course of the Investigation

This thesis fundamentally consists of two main parts, namely a theoretical and an empirical part. The first part starts with a review of the existing literature on the core areas relevant to the research question, explaining the relevant terms related to CRM and cloud-based platforms. The part starts with a definition of Customer Relationship Management and the technological impact on it, followed by a definition of "Cloud" and an explanation of Cloud Computing. Subsequently, the challenges of a technological change process are presented. Furthermore, the company Salesforce Inc and its system is introduced, as the thesis focuses on the implementation process using Salesforce. The second part includes an introduction to the methodology used to collect the results, providing clarity on the research method chosen, the data collection procedure, the sample chosen for the interviews conducted, as well as a derivation of the interview guide and the method of analysis. In doing so, the selection for the respective procedure or methodology is fundamentally explained and justified. Subsequently, the data will be explained and analyzed by means of a content analysis in order to enable a better understanding of the results. The data represents information from 15 interviews with Clients who implemented Salesforce and Consultants. Finally, the discussion section links the results of the empirical section to the revised literature of the theoretical section and identifies the research limitations of the paper, pointing out possible implications for future research as well as the managerial relevance of the paper. The concluding part illustrates the core statements and delivers a take-away message

2   Literature Review

The following section provides definitions and explanations of relevant frameworks and existing theory on the topics: Customer Relationship Management, Cloud, Cloud Computing, challenges of a technological change process. Furthermore, a company introduction to Salesforce Inc. is provided in this section.

2.1   Customer Relationship Management

According to existing literature, CRM is defined in several different ways. Some refer to it as a tool, while others refer to it as a philosophy (Meena & Sahu, 2021). However, it is often seen as the process of keeping and building lasting relationships with customers. It is a marketing strategy in which businesses give clients individualized gratification at every interaction

point to enhance each client's contribution to the business's overall profitability. CRM has developed into an effective technique for coordinating the goals of a business and its clients. However, its performance is dependent on both how well the company's CRM strategy is implemented and how appropriate it is. In this context, the intelligent use of technology and data is crucial (Baran & Galka, 2016; Boulding et al., 2005; Kumar & Ramani, 2004). Developing excellent customer relationship management is regarded as one of the most crucial sources of superior performance in today's competitive business climate since getting new customers costs five times as much as keeping or managing existing clients (Ko et al., 2008).

CRM is an organized way of handling client connections by fusing three most crucial elements: people, process, and technology (Chen & Popovich, 2003). There are two methods for deploying a CRM solution: on-premises by putting it on the company server or cloud-based (on-demand) (Dutt & Chauhan, 2019). When an organization has the framework and software in its system, it is called an on-premises environment. With an on-demand system, an outsider owns the base and programming and charges for use. The main difference between the two functions is that access in the on-premises solution access is via the computer's server, while in the cloud solution it is via the Internet. Furthermore, with an on-premises solution, a company must carry out adjustments, maintenance and updates itself. In addition, access to data does not require Internet access. Unlike the on-premises solution, with the cloud solution users can access data from any Internet-enabled device, regardless of location. In this case, the system provider is responsible for hosting, the entire IT infrastructure, maintenance, and security of the system (Manchar & Chouhan, 2017).

Recent technological advancements had a big impact on the CRM process and its organizational outcomes. The Internet is the most important technological development impacting customer relationship management, as it encourages consistent and high-quality consumer engagement (Kimiloğlu & Zarali, 2009). CRM software allows businesses to collect, store, access, share, and analyze a lot of customer data, which results in greater client retention, more efficient marketing, better service to customers and cost savings due to enhanced efficiency (Dalla Pozza et al., 2018; Jayachandran et al., 2005; Suoniemi et al., 2021). According to Khorraminia et al. (2019), CRM technology projects moved from an CRM-on-premises approach towards a cloud-based Software as a Service (SaaS) model, lately. Although there are several advantages, including improved cyber security and fewer development costs in general, the major integration challenges remain the same. In 2017, CRM became the largest software market, as the growing importance of customer relationship management is strongly dependent on technological development (Cruz-Jesus, 2019).

2.2 Cloud (Computing)

The cloud is one of the fastest growing trends in the IT environment. It is impacting how software is developed and how businesses and end users use resources such as servers, workstations, and technology (Poniszewska-Maranda et al., 2020). The term "cloud computing" refers to a business or a person accessing apps on demand from anywhere in the world through a computing infrastructure that is referred to as a "cloud." (Voorsluys et al., 2011). It is a cost-effective solution as it provides better flexibility, accessibility, and data protection. There are three levels at which cloud services that provide IT solutions are located in the field of cloud computing: SaaS (Software as a Service), IaaS (Infrastructure as a Service) and PaaS (Platform as a Service) (Ghazouani & Slimani, 2017; Modisane & Jokonya, 2021). Without needing to install software on their computers, SaaS enables users to communicate with web-based applications over the Internet. When a cloud user wants to use a specific service, they log into a web service using a web browser. PaaS defines the supply of a computing platform with the installation and utilization of all related software programs for an organization. IaaS stands for the hosting, supply of hardware and fundamental services needed to run a cloud (Manvi & Krishna Shyam, 2014).

There are different cloud services that are required for the needs of users or companies. The first is a "Public Cloud" offered to a lot of cloud customers by a cloud service provider without further restrictions, such as Google, which makes the cloud service Gmail accessible to multiple users. A "Private Cloud" can only be deployed within an organization where it is controlled by the service provider or organization itself. In a "Community Cloud", access is limited to organizations and cloud customers that share the same goal. This cloud type can be kept and controlled by members or a separate provider. A hybrid cloud consists of a combination of the cloud types which is used by Salesforce (Amron et al., 2019; Modisane & Jokonya, 2021).

2.3 Challenges of a Technological Change Process

There are several definitions of "Change Management" in the literature. Moran and Brightman (2000, p.66), define it as "the process of continually renewing an organization's direction, structure, and capabilities to serve the ever-changing needs of external and internal customers". There are two different types of organizational changes: planned and unplanned. Unplanned changes are influenced by external factors, such as the economy or the environment (Al-Haddad & Kotnour, 2015; By, 2005). This paper focuses on a planned change process, as a company actively decides to digitize its customer relationship management and is not primarily

influenced by external factors. The most common reason for the failure of such a process is employee resistance, which is driven by emotions. Resistance is also defined as the behavior that serves to maintain the status quo when being under pressure to change it (Waddell & Sohal, 1998; Will & Pies, 2018). The adoption of new technology by users or organizations mostly depends on how well it can improve and optimize their execution of tasks. Technology is seen as a tool to facilitate the tasks that employees are executing. Employees' opinions about benefits and effectiveness are often very subjective and depend on whether the technological implementation is "accepted" or "not accepted". Numerous studies have been conducted in a variety of fields and areas to investigate the factors influencing the acceptance and use of cloud computing technology (Amron et al. 2019).

The Technology Organizational and Environment (TOE) framework, which was developed by Tornatzky and Fleischer in 1990, has still relevance in the present literature (as cited in Cruz-Jesus et al., 2019; Al Hadwer et al., 2021; Christiansen et al., 2022; Katebi et al., 2022; Modisane & Jokonya, 2021). The name is derived from the three factors (technological, organizational, and environmental) that, according to this theory, affect the process of organizational adoption and implementation of technological innovations, including cloud-computing (Bose & Luo, 2011). It has been used in various studies to evaluate the adoption of technological innovations, including SaaS even for the case of CRM (Cruz-Jesus et al., 2019; Martins et al., 2016). Cost, compatibility, and relative advantage are the technological factors, IT readiness and top-management support are the organizational factors, and customer as well as competitive pressure are the environmental factors that have a significant impact on the implementation (Cruz-Jesus et al., 2019; Racherla & Hu, 2008).

2.4 Salesforce Inc.

Salesforce Inc. was founded in 1999 by Marc Benioff, the current CEO, Parker Harris, Frank Dominguez, and Dave Moellenhoff in San Francisco, California (McGinnis, 2022). The International Data Corporation (IDC) has named Salesforce the top CRM vendor for the nineth year in a row with a market share of 23.8%, followed by SAP (5.4%), and Microsoft (5.3%) (IDC, 2022). Salesforce provides a cloud-based CRM software (SaaS) with a high reputation among its users (Poniszewska-Maranda et al., 2020). It offers a simple, adaptable platform that enables businesses of all sizes, geographies, and sectors to create business apps using drag-and-drop tools to get closer to their consumers. Enterprises can innovate and implement digital transformation at scale in an agile and reliable approach with the use of technologies such as artificial

intelligence (AI), blockchain, and cloud. Salesforce provides AI-based low-code and no-code solutions that let programmers and business users build digital experiences, customize, and automate business processes to suit the requirements of any enterprise (Salesforce, 2022). Due to the complexity of implementations that take longer periods of time, the support of external consultancies is required (Suoniemi et al., 2021). However, not every company implementing Salesforce uses them. The benefits for companies of using this globally accessible application marketplace that is scalable and flexible for any size organization are the ability to access an organization's customer data across the enterprise, see and understand data with advanced analytics, make predictions with AI, automate tasks, and personalize every interaction. In the end, businesses can effectively work with employees, clients, partners, and technology to develop cutting-edge customer relationship management (Salesforce, 2022).

3   Methodology

The preceding section, which sets out the theoretical background to the research question of the dissertation, is followed by an examination of cloud CRM implementation in Austria and Germany and the associated opportunities and benefits, as well as risks and challenges, based on expert interviews. Hence, this chapter provides detailed information about the research method, which includes an accumulation of the collected data. Furthermore, it clarifies the structure and guideline of the interviews conducted in order to understand how the answers to the research questions were finally derived. In addition, the rationale for using the specific research methodology is analyzed and explained.

3.1   Research Method

This section explains the methodological research approach and indicates how the technique chosen is relevant and consistent to the theoretical and empirical sections of the paper, as well as the general objective of addressing the research topic (Gephart, 2004).

Research is a systematic process of collecting, analyzing, and interpreting data, and a basic distinction is made between qualitative and quantitative research (Leedy & Ormrod, 2001). Qualitative research can be understood as the most appropriate research method for the purpose of this thesis, as the thesis primarily aims to create an understanding of the topic of cloud-based CRM implementation and to uncover the underlying motives, problems, opportunities, and insights. This is consistent with the widely used definition of qualitative research, which describes this type of research "as a set of interpretive activities that seek to understand the situated

meaning behind actions and behaviors and rely heavily on the researcher as a unique interpreter of the data" (Sinkovics & Alfoldi, 2012, p. 818). Therefore, qualitative methods are suitable for opening research fields that have not yet been explored. Whenever new challenges, opportunities and constellations arise in markets, regarding market processes or in relation to business operations, it is essential to use open and interpretative methods of gaining knowledge (Mick et al., 2004; Sherry, 2004).

The evaluation of the effectiveness and success of the implementation of a Cloud CRM is realized by the management of the respective company that is converting its processes and corporate procedures to Cloud CRM, after or during the implementation. In addition, valuable insights can be gained through the perspective of the people carrying out the implementation and conversion. The qualitative technique provides the opportunity to accelerate the acquisition of the relevant knowledge in a more thorough, qualitative, and understandable manner (Buber & Holzmüller, 2009). Thus, it is meant to deal with emerging industry trends like Cloud CRM (Buber & Holzmüller, 2009). The approach that is open-minded, compassionate, interpretative, and understanding also enables access to both personal and social processes based on an inductive rather than a deductive approach (Arnould & Thompson, 2005). Due to the aforementioned factors, qualitative research ultimately proves to be the most appropriate method for examining the research topic.

3.2 Data Collection Procedure

Unlike quantitative research, qualitative research works with linguistically mediated data and not primarily with numerical data (Babbie, 2014). To obtain data for the study, 15 in-depth interviews serve as the main source of data collection (Grbich, 2013). The literature mentions that there is no exact number of interviews to reach saturation, but one study describes that the most successful examples show that saturation is largely reached after 12 interviews (Galvin, 2015).

Qualitative interviews can be unstructured, semi-structured or fully structured (McGrath et al., 2018). They differ in the amount of control a participant has during the interview. Unstructured interviews may contain only a few predetermined questions, leaving it up to the interviewee to answer the questions. In a semi-structured interview, the interview is often based on an interview guide with open-ended questions, but the interviewer can ask follow-up questions. In comparison, in a fully structured interview, all questions are predetermined and there is no deviation from the questionnaire.

In an unstructured interview, the respondent has control over the pace, scope, and emotional intensity of the conversation. Thus, control over the agenda rests with the participant.

In comparison, in a semi-structured interview, the interviewer sets the agenda using an interview guide. The interviewee has control over the amount of information they want to give. The flexible and adaptable questioning enables the interviewer to obtain information about hidden facets of human and organizational behavior (Kvale & Brinkmann, 2009; Qu & Dumay, 2011). A risk in this case would be that the interviewee withholds important information because a question was not asked (Corbin & Morse, 2003).

Structured interviews are conducted entirely by the interviewer. By using structured interviews with systematized and standardized questions, the variance of information is minimized. However, when using structured interviews, compromises must be made in the breadth and depth of questions. Therefore, respondents are limited in their ability to answer (Segal & Coolidge, 2003, as cited in Hersen & Turner, 2003).

Accordingly, a semi-structured expert interview design was chosen, which is conducted as time-bound conversations between the interviewer and an interviewee. In contrast to unstructured or fully structured interview designs, the chosen approach allows for flexibility in asking interview questions and helps to gain a deeper understanding of the participant's thoughts and feelings, as possible follow-up questions can be asked by the interviewer according to Longhurst (2003, as cited in Clifford et al., 2016). The main attribute of this method is that it appeals to people who have expertise and experience in the area under study (Rubin & Rubin, 2012).

The decisive goal is to obtain a different perspective on the topic under investigation through the expert perspective and the client perspective and to clarify specific research questions that could not be adequately answered through the analysis of the literature by means of open interview questions in a semi-structured design (Rubin & Rubin, 2012). In a qualitative research approach, interviews usually follow a conversational mode in which respondents are given sufficient time to present their perspective on the topic at hand in their own words (Yin, 2015). The questions were carefully developed to guarantee an accurate and authentic exchange of information (Welch & Piekkari, 2006). In addition, the use of a neutral stance when formulating the questions reduces the risk of misinterpretations and bias.

In order to select a suitable sample, purposive sampling, also referred to as judgmental, selective or subjective sampling (Yilmaz, 2013), is an appropriate approach. Accordingly, the main objective is to select interviewees regarding certain characteristics that are of high importance and belong to the population under study (Patton, 2001). The decisive selection criteria

as well as a description of the selected interviewees will be explained in the following paragraph.

3.3 Sample & Procedure

The sample for the present study comprises 15 persons. This sub-chapter will therefore explain the selection criteria and broadly introduce the respondents. To gain valuable insights for the research topic, the sample includes two perspectives, both of which are involved in the CRM implementation process. Therefore, on the one hand, experts, more precisely, people who complete the implementation process based on their knowledge and experience with cloud CRM and Salesforce. On the other hand, clients are interviewed who have commissioned the experts to carry out this change process from on-site to cloud-based CRM. The purpose of the two-sided perspective is to create a holistic basis for analyzing the data in order to obtain results that can be more easily generalized.

3.4 Participants

As already explained in the preceding section, the interview partners were selected based on various criteria. Therefore, these interview partners are presented below, with the expert side being introduced first and then the clients. To ensure a certain degree of anonymity for the interviewees, the companies for which the individuals work are not named.

For the empirical part, a total of 15 interviews were held, of which seven were experts from different levels including Partner, Manager and Senior Consultants. The experts were selected to occupy positions within the company where they have already gained various practical experiences in the implementation of Salesforce. The literature agreed that consultants have more experience with different projects and added that they are used to explain their work to clients and are therefore able to clearly communicate their knowledge (Pries & Stone, 2004). Furthermore, they all have an educational background in economics and business administration. Their professional activities are in customer acquisition, scope definition, and project implementation of Salesforce.

Figure 1: Interview Partner (consultant perspective)

#	Identification	Type
	Interview partner	
	Identification	**Type**
1	Consultant DB	Senior Consultant
2	Consultant OA	Senior Consultant
3	Consultant CE	Manager
4	Consultant GO	Partner
5	Consultant LR	Manager
6	Consultant MK	Expert
7	Consultant BL	Senior Consultant

Furthermore, the customer side is represented by eight interview partners. Those eight participants interviewed come from different industries, have all implemented Salesforce in their company and have taken a leading role. As the clients wish to remain anonymous, no more detailed information can be provided.

Figure 2: Interview Partner (customer perspective)

#	Identification	Type
	Interview partner	
	Identification	**Type**
1	Client CM	Client
2	Client HP	Client
3	Client SR	Client
4	Client SG	Client
5	Client TV	Client
6	Client WP	Client
7	Client DJ	Client
8	Client MB	Client

3.5 Derivation of the Interview Guide

Accurate data collection techniques are the most important aspects that determine quality and trustworthiness and have a significant impact on study results in research methods in general (Gibbs et al., 2007).

The paper is based on two interview guides that focus on the same topics from the perspective of Salesforce consultants and customers who have implemented Salesforce in their company. They can be found in the Appendix A. The structure of the two guides is identical with ten questions, however, the guide for the customer contains two additional reflection questions. Some questions contain sub questions in case the interviewee deviates from the focus. Interviews begin with the interviewer reading the consent form and asking the interviewee if they agree to be recorded for research purposes, followed by a brief introduction to the interviewee and Salesforce implementation projects.

All questions were written to be as bias-free as possible. Nickerson (1998, p. 175) described the confirmation bias as "the seeking or interpreting of evidence in ways that are partial to existing beliefs, expectations, or a hypothesis in hand." This bias operates mostly unconsciously (Brownstein & Saul, 2016). For this reason, the questions were asked in general terms and written so as not to lead to a specific answer. Take, for instance, the following question: "Do companies face any obstacles/challenges?" (See Appendix A). If this question had been posed as "Which obstacles/challenges do companies face?" the likelihood that one would identify obstacles and challenges would be higher as it is already implied in the question that these exist. In addition, care was taken not to ask two questions combined in one, not to lead to "yes/no" answers, and not to be too vague or intrusive (Rowley, 2012).

In an interview, the sequence should be as natural as possible and lead to the conclusion of the conversation in a natural way. Thus, earlier questions often set the context for later questions (Rowley, 2012). Moreover, the beginning of an interview is typically characterized by great uncertainty, as the interviewer and interviewee may not know each other. For this reason, one should get the interviewee talking and ask a simple open question (DiCicco-Bloom & Crabtree, 2006). When conducting the interview, therefore, after a brief round of introductions, I asked what role they play in an implementation process (in the case of consultants) or what points of contact the person has already had with Salesforce (in the case of customers).

Questions three to four are necessary to understand the background and the current situation The third question in the client's guide focuses on why they chose to implement Salesforce, which helps to understand the need. The sub-questions relate to the origin of the decision to undertake such a project, the goal of the project, why they explicitly chose Salesforce as their CRM system, and the impact of using Salesforce on CRM. Subsequently, the importance of Customer Relationship Management in today's competitive environment is surveyed in more detail. The associated sub-questions refer to the technological development in the CRM area

including its advantages and disadvantages, how the cloud technology influences CRM and what benefits Salesforce brings to the management of customer relationships.

The fifth question asks openly how the implementation process, which is also a change process, took place in the company. Based on this question, similarities and differences in their implementation approaches can be identified. The following questions refer to the main issues the thesis deals with: Both what obstacles they faced and risks that arose, as well as what benefits they gained from the implementation, what factors led to a successful implementation, and what opportunities the process offers the company in the long term. These are the main questions referring to the three research questions.

The last questions attempt to capture a reflection component. They ask what lessons they learned through implementation and what they would do differently in retrospect based on their implementation experience helps in deriving recommendations for action when implementing Salesforce or other Cloud CRM systems.

The interview guide of the consultants asks the same questions, but it refers to their assessments and experiences from different Salesforce implementation projects. To determine if the interview guide meets the research questions, a pilot interview was conducted with an additional consultant, as recommended in the literature (Rowley, 2012), which allowed for fine tuning of the final details.

3.6 Method of Analysis

For researchers who aim for a relatively low level of interpretation, the use of qualitative descriptive techniques like content analysis and thematic analysis is suitable (Leedy & Omrod, 2001). Both approaches enable a qualitative analysis of the data. With the help of content analysis, it is possible to analyze the data qualitatively and quantify it at the same time (Grbich, 2013). In this two-step procedure, the data is first coded and recorded in a frequency table (see Appendix B) in order to subsequently draw conclusions about the patterns and themes. By using this approach, a high degree of objectivity can be achieved in the analysis of a qualitative research method (Leedy & Omrod, 2001). The content analysis will be explained in more depth in the following (see Figure 3).

By defining the analysis plan before conducting the interviews, the likelihood that all relevant data is captured is maximized. At first, the interviews will be transcribed and coded (Adeoye-Olatunde & Olenik, 2021). A qualitative coding approach (QCA) is an approach that uses a systematic coding approach to describe and interpret textual data. With this approach,

categories, themes, and patterns are identified (Elo & Kyngäs, 2008; Hsieh & Shannon, 2005; Zhang & Wildemuth, 2009). It can be done either by hand, for example, highlighting and adding notes or by using a qualitative research software. There are two approaches to code data. One approach is called inductive when the codes are derived entirely from the interview results (quotes). A deductive coding approach is used when the interview results further inform the theory and how they compare to the existing literature (Adeoye-Olatunde & Olenik, 2021).

The results of this paper are developed based on data-driven rather than theory-driven coding, hence, follow an inductive coding approach (Williams, 2007). In general, the whole paper follows an inductive research approach. This approach appeals most fitting as qualitative research "is a holistic approach that involves discovery" (Williams, 2007, p. 67). By means of inductive reasoning it is possible to unfold information and generate new theory (Boyatzis, 1998; Williams, 2007). It is important to mention that there exist some limitations regarding this type of research, for example, that it cannot be used to prove anything, but only provides conclusions based on experience and therefore does not guarantee a valid conclusion. However, since there is limited information in the area under study, the experiences from the interviews will serve as a basis for drawing conclusions. Therefore, inductive analysis helps to understand the meaning behind the data collected in the Interviews and to draw a conclusion based on it (Boyatzis, 1998).

The analysis of the data is based on the content analysis approach of Mayring as discussed earlier in this paragraph (Mayring & Brunner, 2006 as cited in Flaker & Schmid, 2006; Mayring & Fenzl, 2019). They propose an eleven-step method for a QCA (see Figure 3).

Figure 3: Mayring 11-step method for a qualitative content analysis
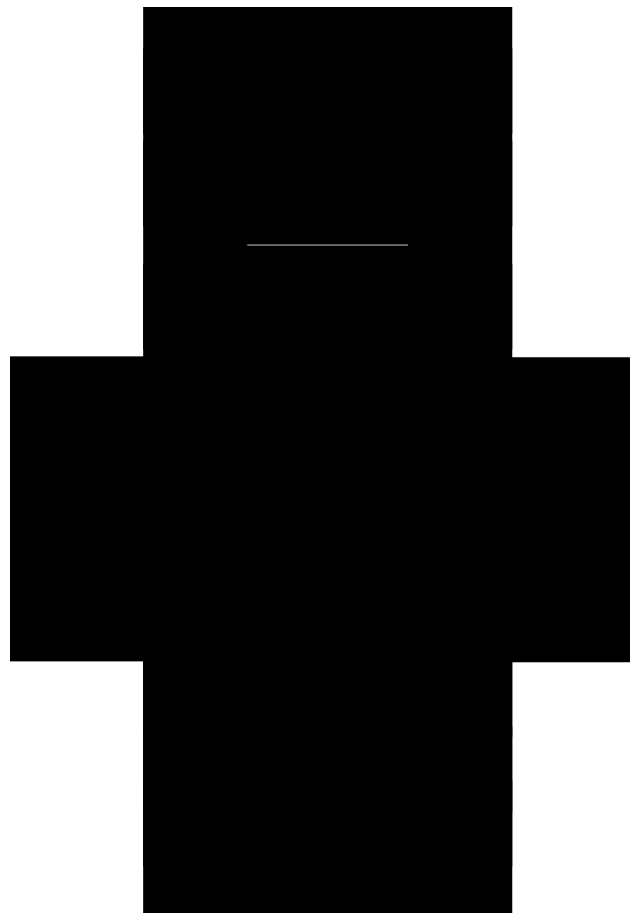
Source: Mayring and Brunner (2006, as cited in Flaker & Schmid, 2006)

First, the research questions were defined and the material for the qualitative research was selected (interviews). Afterwards, the direction of the analysis was set and an inductive approach was determined due to the arguments that have already been presented. Afterwards, the individual categories and subcategories were selected and the level of abstraction determined (i.e., how detailed the categories were defined). Then, the inductive category formation takes place. The main categories are "Reasons of Implementation", "Goal of Implementation", "Role of Customer Relationship Management", "Customers Today", "Benefits", "Opportunities", "Obstacles", "Challenges", "Risks", "Implementation Structure" and "Actions". Therefore, the text was scanned from top to bottom and categories were developed. After that, the category system was checked for meaningfulness. The categories not directly related to the research questions, such as the reasons and the goal for the implementation, as well as the role of customer relationship management, today's customers, and implementation structure, were defined to provide a basic understanding of why companies implement Salesforce and an overview of the implementation process. The approach described above is a form of data analysis within

qualitative research. Nevertheless, it involves reporting the data in a quantitative format to enable a more "detailed and systematic examination" (Leedy & Omrod, 2001, p. 155). A reliability test could not be carried out in this case as this work is an individual thesis.

4   Results

The following section describes the findings of the 15 interviews conducted. The findings are analyzed using the content analysis approach developed by Mayring and Brunner (2006, as cited in Flaker & Schmid, 2006). The findings are structured by numbers and clustered into frequencies (see Appendix B). Appendix B illustrates the data coding including themes and patterns. Based on that the following part provides information on the data that serve the purpose to answer all research questions. Hence, the following part is structed according to the research questions. Furthermore, within those paragraphs a figure displaying the frequency of the statements (see Figure 5-9) helps to identify the most important patterns and themes within the data that answer the research questions.

Moreover, two sections, namely, "The Need to Digitize" (see 4.1) and "Implementation Plan" (see 4.2), do not directly relate to the research questions, but are vital to a comprehensive understanding.

4.1   The Need to digitize

This section includes statements from consultants and customers about why it is necessary for companies to digitize and why Salesforce is being implemented.

First of all, in general, "customer expectations have changed in the sense that nowadays a customer wants to be served in a completely different way […]" (Consultant OA, 36). Furthermore, the market situation has changed considerably over the last few decades as there are more and more competitors on the market, giving customers a wide choice of alternatives (Consultant OA, 36). For this reason, it is more important to attract the customer and retain him in the long term. Customer expectations have increased due to strong competition. Therefore, it is of great importance to offer the customer an individual experience tailored to their needs (Consultant GO, 35). Customers want to be treated and addressed as individuals on all channels (Consultant OA, 29; Client SG, 32; Client SR, 33). Furthermore, customers are becoming less forgiving these days. Whereas a few years ago a customer had to have an average of three bad experiences before leaving the company, studies have shown that today a customer leaves the company after one bad experience (Consultant GO, 35). Many small companies on the market take a much

more personal approach to the customer and thus win customers. Often companies lack good customer relationship management and knowledge about their customers (Consultant MK, 26). For this reason, the focus on CRM is increasingly important for companies to be able to operate in the market in the long term and to maintain profitable customer relationships (Client WP, 27; Client DJ, 28).

In the field of CRM, technological development is crucial. Technology should serve the needs of customers and put them at the center (Consultant OA, 25). This is the driving reason for companies to implement a CRM platform like Salesforce in their business. There are several situations, as indicated by the interviews, from which the need for this decision has occurred. As can be seen from the statements in the interviews, the most common motivations are process optimization and the desire to digitize and replace outdated systems (Consultant DB, 1; Consultant OA, 2; Client WP, 3; Consultant LR, 4; Consultant MK, 5; Client CM, 12; Client HP, 13; Consultant LR, 14; Client WP, 15). By moving to a cloud-based CRM solution such as Salesforce, companies want to increase efficiency and customer satisfaction and view all data centrally on one platform. (Consultant DB, 16; Consultant OA, 19). In order to be able to continue to serve growing customer needs in the future, they hope that this will enable them, among other things, to collaborate better with their customers and to get to know them better and address them in a more targeted manner (Consultant LR, 22). Clients too, share this hope (Client SG, 23).

4.2   Implementation Plan

For the further course of the thesis, it is necessary, to understand how an implementation process takes place in practice. The structure is based on statements from partners and managers.

The process can begin with a discovery phase, where so called discovery workshops are conducted with the customer to find out what the customer's goals are, what pain points they have and how Salesforce can support them in achieving their goals. The end products of the discovery workshops are so called user stories. The next step is to prioritize the user stories. The prioritized user stories are then worked through in two to three-week implementation sprints. Sprints entail the following increments: Sprint planning, daily stand-up, sprint review and sprint retrospective. Afterwards, a User Acceptance Testing (UAT) takes place to check whether the users accept it or continue to give feedback. If the UAT is successfully completed, the training phase starts, where the users are trained on the platform. Then the go-live

of the Minimum Viable Product (MVP) follows. After the go-live, the "hypercare phase" (Consultant GO, 159) starts, where bugs are fixed and lessons are learned, which are then worked through again in a new Release 1. The complete implementation process is accompanied by the Change Management process since the discovery phase (see Figure 4) (Consultant CE, 157; Consultant GO, 158 & 159; Consultant LR, 160 & 161).

Figure 4: Implementation Process
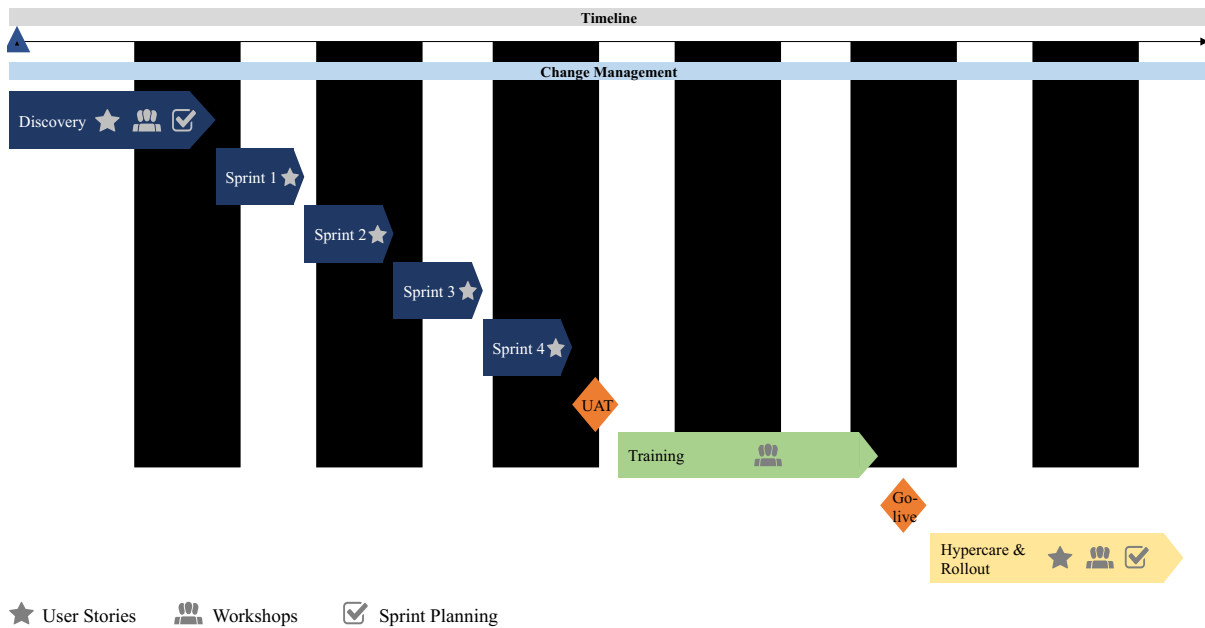
Note. Self-developed based on the interviews (Appendix B)

4.3   Risks and Obstacles

In the following an overview of the risk factors as well as obstacles is provided that include an indication of the frequency of being named within the 15 interviews (see Figures 5 & 6). Afterwards the identified categories will be further elaborated on.

Figure 5: Classified risk factors based on the frequency of mentions
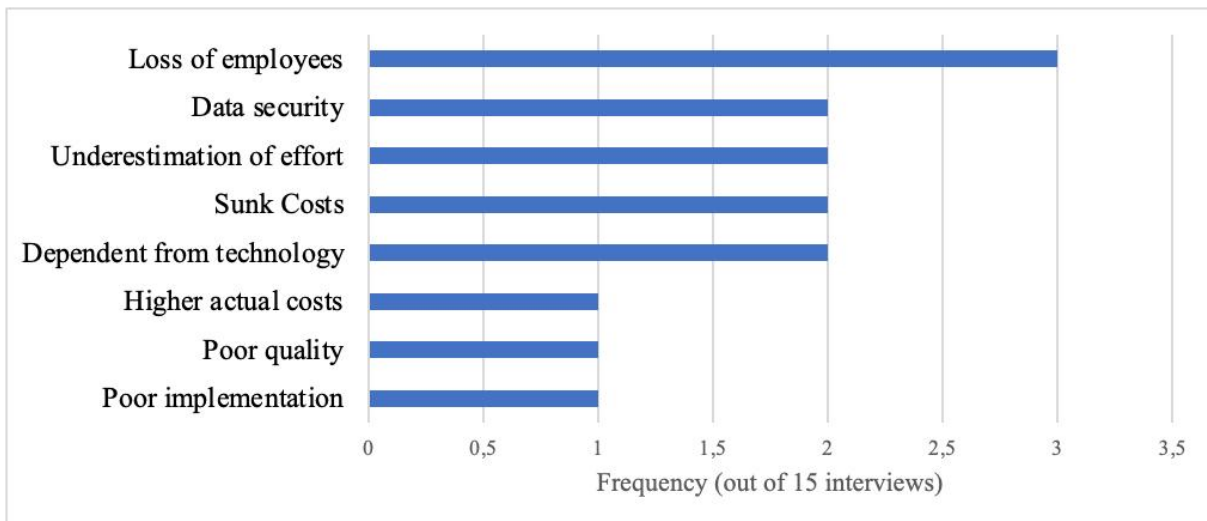
Figure 6: Classified obstacles based on the frequency of mentions
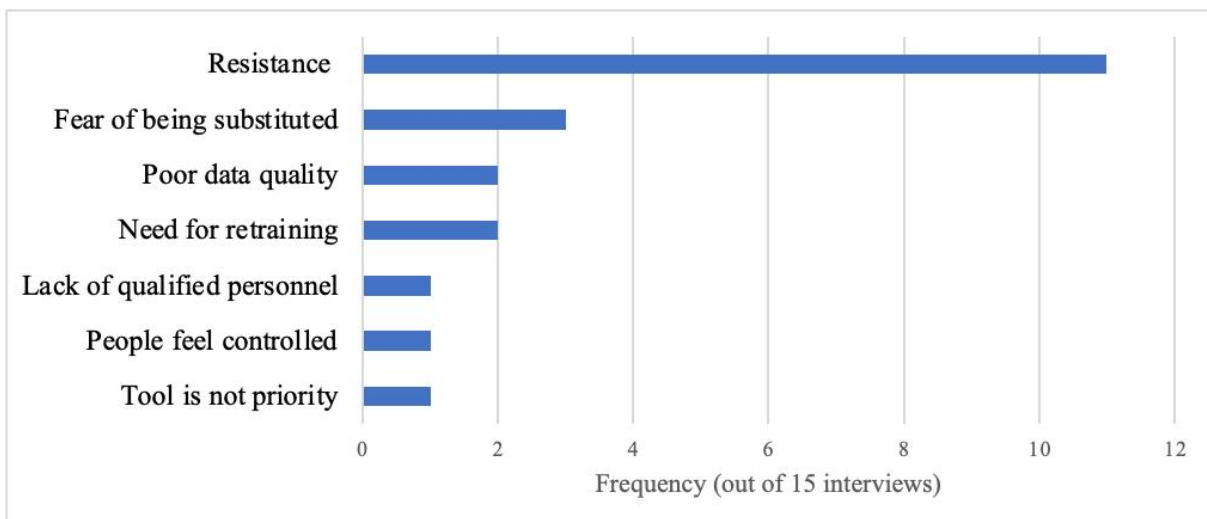
During the process, companies face various obstacles and risks. As revealed in the interviews, the biggest obstacle for the companies is the resistance of the employees (see Figure 6). "People are creatures of habit" (Consultant MK, 116). According to Consultant DB (112), they are reluctant to step out of their comfort zone and are less open to change. Often, employees are satisfied with a routine, no matter how inefficient it is, because they have become used to the situation. Consultants perceive that these obstacles stand in the way of companies making any change, which is why change management exists (Consultant GO, 114). This is one of the factors that greatly influenced the implementation process. Employees were skeptical and critical of the process (Client CM, 117; Client SG, 119; Client DJ, 120) and this came across to

consultants (Consultant LR, 15; Consultant BL, 121). Since it is a technological change process, especially older employees are reluctant and resist (Consultant OA, 113; Client HP, 118). One reason for employee resistance is the employees' fear of being replaced by technology (Clients & Consultants,127-129). Consultant CE (127) and Customer SG (129) explain this fear with "lack of knowledge". Therefore, companies need to be trained on the new tool, which also requires a lot of effort (Consultant DB, 122; Consultant GO, 123).

In addition to structural, there are also technical obstacles. Often, legacy data in the systems have been entered incompletely or differently by employees. This leads to limited quality and usability according to consultants and clients (Consultant OA, 124; Client SR, 125). Moreover, companies lack qualified employees who are familiar with the Salesforce system (Consultant MK, 131). In addition to the obstacles that companies face, there are also potential risks. Since employees are dissatisfied with the situation and resist at the beginning of the change, both parties state that the main risk for companies is to lose employees (see Figure 5) (Consultant DB, 142; Consultant OA, 143; Client SR, 144). Another aspect is the dependence on such a system both financially and managerially. On the one hand, companies commit to one-, two-, or three-year licensing costs (Consultant LR, 146). On the other hand, one makes oneself dependent on the use of the tool and "it's not likely to throw it away after one year" (Consultant OA, 145). Another risk is underestimating the effort that needs to be put into such a project (Consultant CE, 150) which could lead to a poor quality of the project and sunk costs (Consultant OA,148; Client DJ, 149; Consultant GO, 152).

Consultants and clients mentioned that companies use Salesforce, among other things, to centralize their data and harmonize various internal processes (Client WP, 9; Client DJ, 10; Client CM, 11; Consultant DB, 16). In international projects, there are often different processes in different countries, where a suitable solution must be found for everyone (Consultant DB, 151). This can ultimately lead to higher actual costs and exceed the budget (Client WP, 155). Furthermore, when working on a digital platform, there are always the risks concerning data security. Especially since the daily work is connected with customer data on Salesforce, data security plays a big role (Client CM, 153; Client SG, 154).

4.4   Benefits & Opportunities

The following is an overview of the benefits and opportunities derived from the data. The figure indicates the frequency of mentions within the 15 interviews (see Figure 7 & 8). Hence,

15 is the maximum number that can be achieved. Afterwards the identified categories will be

Greater scalability

Transparency

Market changes, forecasts

New technologies & functionalities

Platform expansion

New potentials

0   0,5   1   1,5   2   2,5   3   3,5

Frequency (out of 15 interviews)
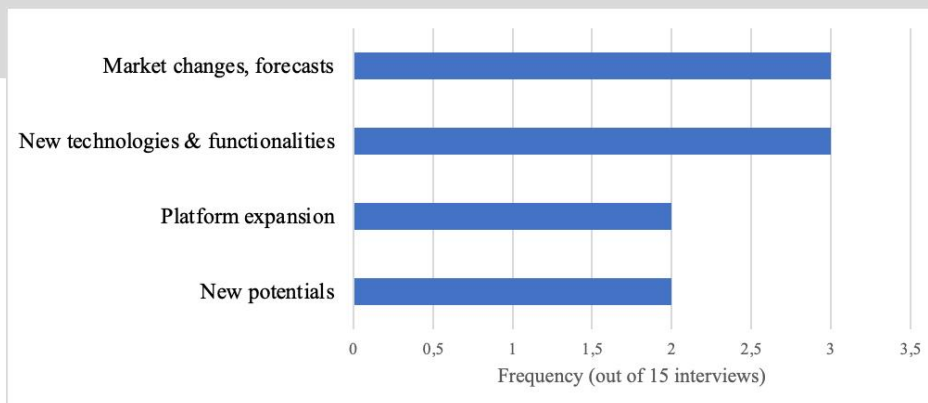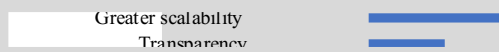
With the implementation of Salesforce, consultants and customers report several benefits for businesses (see Figure 7). One of the most important strategic aspects is that Salesforce provides companies with a 360-degree view of their customers. The 360-degree view consists of the information, of the customer through different channels and touch points of their customer journey (Consultant MK, 88, Client HP, 89). All this information is stored centrally in Salesforce and is accessible from any device and location (Consultant DB, 71; Consultant GO, 85; Consultant LR, 87; Client SG, 90; Client WP, 91). Information at each touchpoint can be, for example, whether the customer called the service center, spoke to the salesperson, ordered something from the online store, complained, or sent an email (Consultant GO, 86). This customer information simplifies customer interaction and enables, among other things, more

personalized marketing, which ultimately leads to higher customer satisfaction (Consultant OA, 75; Consultant LR, 87). Because Salesforce is cloud-based, all information is available from any device, anywhere, at any time, which is a significant advantage over a traditional on-premises solution according to consultants and clients (Consultant OA, 41; Consultant DB, 42; Consultant GO, 43; Client SR, 44; Client WP, 45; Consultant CE, 46; Consultant LR, 47; Client MB, 48). Everyone working with the system receives just-in-time information that is relevant to day-to-day operations (Client HP, 74; Consultant WP, 78). With the use of this customer information, employee efficiency and productivity increases on the one hand, and time and costs are saved on the other (Consultant CE, 76; Consultant LR, 77; Client MB, 79).

In general, full transparency is created in the area of communication and cooperation between companies and their customers (Client CM, 98; Client HP, 99; Client SR, 100). With the help of dashboards, users can track the company's performance immediately (Consultant GO, 58). - "That's where we can really see where we have improvements, where we still have opportunities to do something. The second thing is that we can really confront customers with the market situation we're facing" (Client SR, 59).

In addition, the platform creates flexibility in many respects. Salesforce's unique selling proposition (USP) is according to consultants its configurability (Consultant LR, 66; Consultant DB, 60). Salesforce can be compared to a "modular system" (Consultant BL, 70). This means that companies always have the option of extending the platform for themselves, for example, by connecting a new cloud or a new app to their existing system (Consultant LR, 95). Compared to an on-premises solution, Salesforce has the advantage of scalability. New licenses can be purchased and connected at any time. (Consultant OA, 37; Consultant GO, 38; Client WP, 39; Client BL, 40; Consultant CE, 106). In addition, clients stated that the platform is very user-friendly, which was the most mentioned benefit (see Figure 79) (Clients & Consultants, 60-70). No programming in the standard functions is required to configure the site; all customizations to the platform can be done by drag and drop (Consultant GO, 65). Thus, Salesforce can be quickly adapted when changes occur in the company (Consultant CE, 63).

Moreover, Salesforce ensures constant adaptation to new technological developments as Salesforce has three release cycles per year in which improvements are made to existing functionality or new technologies are developed or purchased and integrated into the platform (see Figure 8) (Consultant DB, 101; Consultant CE, 102). According to clients and consultants, having a clear view of data on the Salesforce platform allows to capture changes in the market more quickly and make better forecasts (see Figure 8) (Customer WP, 108; Consultant DB,

110) Furthermore, one interviewee mentioned that Salesforce has enabled him to increase his forecasts from six months to one and a half years (Client DJ, 109).

4.5 Factors for a successful implementation

The clients stated that their Salesforce implementation was "very successful" (Client CM, 223; Client HP, 224; Client SR, 225; Client DJ, 226) or "mostly successful" (Client SG, 219; Client TV, 220; Client WP, 221; Client MB, 222) (see Figure 9). The actions that can contribute to a successful implementation are discussed within this paragraph.

Figure 9: Level of success of implementation process (out of eight clients)
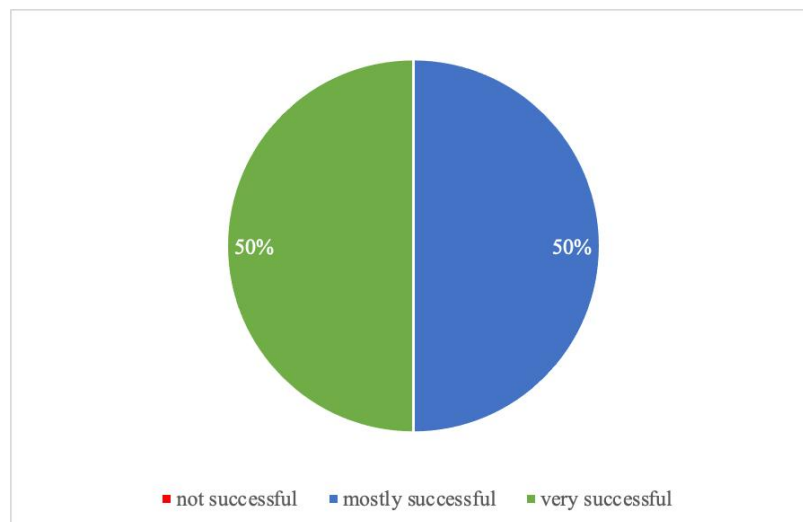
Given the successfully perceived implementation processes, the measures and findings derived from the data are presented (see Figure 10) and later explained in more detail based on the three phases of implementation (i.e., before, during and after implementation). In general, following these measures is beneficial for a successful implementation process.

Figure 10: Identified actions based on the frequency of mentions
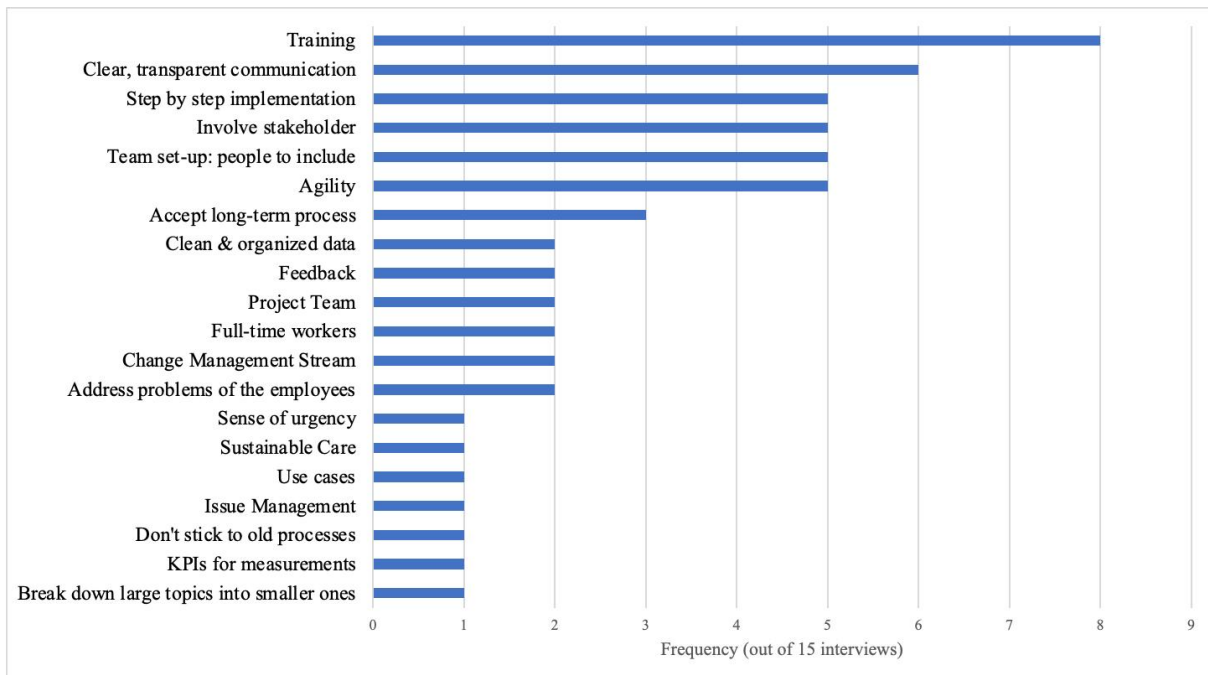
During the interviews, clients and consultants provided some recommended actions on what to look for in the process, and finally reported insights on what they would do differently if they were to do the process again. To offer a sensible structure, the actions and lessons learned are divided into actions before, during, and after implementation.

Before the implementation

At the beginning, according to consultants and clients, it is important to get the affected department heads and management on board, because often such a decision is made from the top down (Consultant LR, 170; Consultant OA, 6; Client MB, 7; Consultant CE, 8). A separate project team should be created for the implementation, which also manages risks and assigns responsibilities directly (Consultant GO, 196; Client CM, 206; Client HP, 207). "Key users" are essential for the implementation. They are the intermediaries between the employees and the implementation team who are responsible for collecting and forwarding information from their divisions so that feedback loops can be used (Consultant DB, 168; Consultant CE, 169; Client SR, 171). When putting together the implementation team, it can be helpful to integrate one person who is "on fire for the project" and one person who is an opponent of the project. Once the opponent is somewhat convinced, he or she self-promotes the project and convinces other opponents (Consultant CE, 169). Since such a project needs to be approached in a structured and unified way, it is very important that decisions are made by top management and that

a sense of urgency is created (Consultant BL, 217). As mentioned above, employee resistance is one of the biggest obstacles for companies. Therefore, consultants and clients agreed that it is important to have clear and transparent communication, address employees' problems, and show them the benefits of working with the system (Consultant OA, 188; Consultant BL, 192; Client MB, 193). For example, if the resistance is that employees are afraid of being substituted, it is important to show them that they will not lose their jobs but will take on other value-adding tasks (Client HP, 190). Having a vision and communicating it with employees helps them understand the added value of the project. It is crucial to explain why we are going down this path and to build a sense of community (Customer SR, 191). Using use cases, i.e., concrete ideas and cases, also leads to a better understanding of the employees.

An important aspect for a successful implementation is a clean data structure in advance. From their experience, clients stated that legacy data in existing systems and Excel sheets should be prepared before data migration to save time (Client WP, 215; Client DJ, 216). Key Performance Indicators can be defined prior to project implementation in order to be able to see in retrospect whether the objectives have been achieved (Consultant CE, 194). Clients and consultants reported that because of the time commitment and complexity, they would assign some employees to work 100% on the project and their job would be to deeply understand the system and become familiar with the technical functions (Consultant MK, 204; Client WP, 205).

During the implementation

During implementation, all relevant employees and departments should be involved in the process and made participants. According to clients and consultants, the goal should be to make the benefits visible not only to top management but also to the individual departments and employees (Consultant OA, 173; Consultant GO, 174; Client SR, 175). Interviews with employees should be conducted in the discovery phase (See Figure 4) in order to understand their goals and to define the user stories on that basis (Client WP, 177). The implementation process should follow a hybrid agile methodology. In other words, a mixed approach of classic implementation and agile development (Consultant LR, 165; Client CM, 166). The classical part includes the rough structural plan, as described in Figure 4. The agile part is based on adapting the process based on the experience and feedback from the employees (Consultant CE, 163). When converting to a new CRM system, it should be avoided to map old processes identically again. This leads to the fact that old loads are simply transferred as well (Consultant GO, 195).

As such an implementation process is lengthy, one needs a long-term plan in which one proceeds iteratively in the project and does not try to implement all adjustments and functions

at once (Consultant MK, 199; Customer CM, 200; Customer SR, 203). One customer described this approach to their project as a major success factor (Customer HP, 201). The most important factor for successful implementation is the employee training to familiarize them with the system (Client LR, 160; Consultant OA, 178; Consultant GO, 179; Consultant MK, 180; Client HP, 181; Client SG, 183; Client DJ, 184; Client WP, 185). Since different people need different training, it is important to prepare appropriate training for employees (Consultant GO, 179). During the entire process, it is important to regularly obtain feedback from the users and to work with so-called feedback loops.

After the implementation

In the long term, this agile method should also be followed in order to obtain the increased amount of customer information and to optimize the system step by step (Client SR, 211; Client DJ, 212). Furthermore, such an implementation is "not a sprint but a marathon and must be managed sustainably" (Client DJ, 214).

5 Discussion

In the following paragraph, the findings from the existing literature are connected and compared to the results of the interviews. The most important theoretical and empirical findings are discussed in this section, along with an explanation of their relation to the proposed research questions. In addition, this section includes a section on concordance and discordance between consultants and clients, which is compared with the existing literature.

5.1 The necessity to digitize

Both in the literature and results from the interviews, it is described that companies must adapt to the ever faster changing circumstances in competition in order to optimize processes and increase efficiencies (Consultant DB, 1, Consultant OA 2; Client WP 3; Consultant LR,4; Avramakis, 2020; Blanchard, 2020). For companies, customer relationship is one of the most important aspects for superior performance in today's competitive market (Day, 2000). Since it is more expensive and difficult to acquire new customers than to retain and manage existing ones, it is the responsibility of companies to invest in it (Ko et al., 2008; Consultant OA, 19). Customers today are engaged on more channels (online and offline) than in the past (Consultant MK, 88; Deufel 2020). In the interviews it was mentioned that for this reason customers have a wide choice of different providers, both online and offline. Due to high substitutability,

customers have a lot of power in the market and are becoming more demanding upon companies. It was mentioned in the interviews (Clients & Consultants, 29-33; Consultant GO, 35; Consultant OA, 36). And in the literature (Anshari et al., 2019) that in order to retain customers, companies need to be able to address their customers more personally and understand their needs and buying behavior. To achieve this, customers need a 360-degree view of their customers to form a holistic picture of all stages of their customer journey. Again, consultants and clients (Clients & Consultants, 83-91) concur with the literature (Deufel, 2020) that with the help of Salesforce, they can build a profile of the customer by connecting various data sources and to have all information digitally accessible on one platform from any location.

5.2 Actions to overcome Obstacles and Risks

In general, according to the interviews, successful implementation requires that the necessary people be involved in the process. This includes management, department heads and key users (Clients & Consultants, 168-172). Project management should be established, which also addresses potential risks (Yang, 2016; Consultant GO, 196; Client CM, 206; Client HP, 207). The entire implementation phase should be accompanied by a change management stream from the start of the discovery phase (See Figure 4), where the goals and vision are clearly communicated (Kotter, 1995; Consultant GO, 197). According to the experts, a hybrid agile approach should be used for implementation. This means that there is a classic implementation plan, starting with the discovery phase, followed by the execution of the sprints, user acceptance testing and training (See Figure 4). However, this rigid plan should be managed in an agile manner by having open communication and obtaining feedback from users in order to optimize use for users (Consultants156-161, Clients & Consultants162-166). Indeed, the use of an agile methodology in an implementation process is also advocated in the literature, even if not specifically for Salesforce (Dhir et al., 2018; Thesing et al., 2021). And communication is relevant for the success of organizational change (Armenakis et al., 1993; Klein, 1994).

In the existing literature, the implementation of a CRM system such as Salesforce is not discussed further. However, since such an implementation process is also an intensive digital change process for companies, they are faced with various challenges, obstacles, and risks. According to existing literature and interview findings, the biggest obstacle for companies and the most common reason for the failure of change initiatives is employee resistance (Waddell & Sohal, 1998; Will & Pies, 2018; Clients & Consultants, 111-121). According to the interviewees, this is often due to the fear of being substituted by technology and losing their job or

feeling controlled when they have to disclose all their data in the system (Consultant CE, 127; Client HP, 128; Client SG, 129; Consultant CE, 130). This fear is also mentioned in the existing literature (e.g., Ivanov et al., 2020).

The literature describes that the adoption of a new technology depends on how it can optimize the execution of tasks for users (Amron et al., 2019). To minimize employee resistance, several aspects were mentioned in the interviews such as including essential employees in decision-making processes, transparent communication, and highlighting benefits from using the system (van Zoonen et al., 2021, Clients & Consultants173-177; Consultants & Clients, 188-193; Client SG, 213; Consultant BL, 217). In order not to overwhelm the employees with the implementation, the interviewees reported to expand the platform step by step (Clients & Consultants, 199-203). In the literature, continuous and permanent change is mentioned as a success factor in change management (Lauer, 2021). However, since the literature does not provide details about the implementation of Salesforce, the following measures are derived entirely from the current research findings.

One obstacle mentioned by a customer and consultant was technical in nature. They reported that it was very time consuming and hindered the implementation process if legacy data was kept unclean in old CRM systems or in Excel sheets. This causes problems when migrating data into Salesforce (Consultant OA, 124; Client SR, 125). For this reason, a clean data structure should already have been created before implementation (Client WP, 215; Client DJ, 216). Indeed, Jyoti and Hutcherson (2021) point out to look for duplicates, wrong or missing data. Likewise, Masri (2018) mentions that the whole data migration needs to be planned well. The migration plan should include a project plan, with dependencies, a timeline and milestones.

One consultant stated that companies often do not have qualified users who are familiar with the system and the application (Consultant MK, 131). Customers also spoke of various technical challenges where they lacked understanding (Client MB, 137; Client TV, 138). Hence, it is necessary to train the employees on the system and provide a personally tailored training plan as each person will also use the system differently. According to the interviewees and literature, this is the most important aspect for a successful implementation (Edmonds, 2011; Clients & Consultants, 178-185). Two of the respondents even said they would allocate staff to gain knowledge of the system (Consultant MK, 204; Client WP, 205).

Implementation also entails risks for companies. The greatest risk is that employees could leave the company due to the change and resistance (Consultant DB, 142; Consultant OA, 143; Client SR, 144; Morrell et al., 2004). However, this is only a potential risk, which has not demonstrably occurred within the interviews. Another aspect is that companies become

dependent on the platform for several years due to the licenses (Consultant OA, 145; Consultant LR, 146). Since Salesforce is cloud-based, there are also potential cyber risks (Zissis & Lekkas, 2021). However, Salesforce uses state-of-the-art technology to minimize this risk (Salesforce, 2022). In addition, the effort and scope of the project could be underestimated, resulting in higher actual costs (Consultant CE, 150; Consultant DB, 151; Client WP, 155). Therefore, it should be understood from the outset that this is a long-term process and planning should be approached more pessimistically in terms of time (Client SR, 208; Client MB, 209; Client SG, 210). Existing literature states that the project's budget in a CRM implementation is a very common problem. A major reason is that the internal costs of labour are not included in the project costs (Pries & Stone, 2004). Another cause of business change failure is the company's increasing short-term focus on success, as a change process must be long-term (Lauer, 2021). Client DJ (214) suggested that in the long term, companies need to manage implementation sustainably and build up expertise. Indeed, doing so has proved fruitful in the past (Sackmann et al., 2009).

In order to have a condensed overview of the actions, they have been summarized and are presented below (see Figure 11).

Figure 11: List of actions

Timeline		
Before Implementation	- Include top management (i.e. CEO) & heads of department - Identify and include Key User - Interviews with Stakeholder - Adress employee's problems - Create a sense of urgency - Use Cases for demonstration - Focus on advantages of Salesforce - Clear and transparent communication - Have clean legacy data - Builld a Project Team with Issue Management - Change Management beginning with Discovery Phase - Have employees working full-time with Salesforce - Key Performance Indicators for measurement	
During Implementation	- Involve relevant employees/users - Do not stick to old processes - Hybrid agile method - Step by step implementation - Trainings - Feedback loops	
After Implementation	- Sustainable care (people & system)	

Note. Self-developed based on the interviews (Appendix B)

5.3 Benefits and opportunities due to Salesforce

Advantages and opportunities of Salesforce are partly described in the literature, but deeper insights are gained through the interview results. Salesforce's USP and the most frequently cited advantage is its usability. Since the platform is based on low-code and no-code, users of the platform can easily customize the platform through drag & drop (Salesforce, 2022; Clients & Consultants, 60-70). Other advantages include the scalability and flexibility of the system (Salesforce, 2022; Clients & Consultants, 37-40; Clients & Consultants, 93-97).

The centralized data and connection of other data sources enable a 360-degree view of the customer, which makes it possible to target marketing activities more effectively and track and report on performance (Deufel, 2020; Clients & Consultants, 75-80, Clients & Consultants, 83-91). Moreover, due to cloud technology, users have the ability to access the platform from any internet-enabled device. The only thing needed is a stable internet connection (Manchar & Chouhan, 2017; Clients & Consultants, 41-48). By using Salesforce, market changes can generally be identified more quickly and forecasts for the company can be made more accurately (Client WP, 108; Client DJ, 109; Consultant DB, 110). Due to the three releases per year, the Salesforce platform is regularly improved and functionalities, as well as technologies are extended (Consultant GO, 52; Client WP, 53; Consultant GO, 54; Consultant DB, 101; Consultant CE, 102; Client CM, 103). As the platform grows, Salesforce continues to offer new clouds for new industries or subject areas (Consultant GO, 80; Consultant OA, 81; Consultant GO, 82).

5.4 Concordances and Discordances between Consultants and Clients

The following section discusses the similarities and discrepancies between consultants and clients in terms of implementation. The results of the interviews are compared with findings from the existing literature. In general, concordances between clients and consultants emerged for most information displayed in the interviews.

In the literature, one study (Fullerton & West, 1996) described that clients want consultants to take the time to understand and consider their organization's situation and functioning. Clients further ask for an approach that is not too theoretical as well as tailor-made solutions. The customers also wanted efficient execution of the consultants' work and good value for money. According to the consultants, clients must have a clear problem, take ownership of the problem, be open to change, and have the organizational motivation to put the recommendations into action. From the literature, different expectations which were previously mentioned between consultants and clients can be identified as a problem. In order to prevent such a problem, a

kick-off meeting should be held at the beginning of the implementation process to discuss the project scope and the intended outcome (Besner & Hobbs, 2006; Hamburger, 1992).

In general, no discordances between consultants and clients emerged from the interviews, contrarily to what the existing literature would suggest to be the case.

From the interviews it emerged that clients were motivated to change and described their implementation process as "mostly successful" or "very successful" (see Figure 9). The consultants spoke of a discovery phase at the beginning of the implementation process, where user stories are defined, and work according to a hybrid agile approach (Dhir et al., 2018; Thesing et al., 2021). In this approach, regular feedback takes place with the client's staff to make regular adjustments to the system and address their needs (Consultant CE, 157; Consultant GO, 158; Consultant LR, 160; Clients & Consultants 162-165). In addition, the consultants also conduct customized training for staff, as each of them learns differently and requires different features of the system (Consultant GO, 179). The consultants and clients interviewed mostly met each other's expectations from the literature for successful implementation.

In general, customers and consultants stated the same benefits, obstacles, risks, and opportunities of a Salesforce implementation. Only individual aspects were mentioned exclusively by consultants or customers. For example, only consultants mentioned that Salesforce can be used for different industries (Consultant OA, 81; Consultant GO, 82) and that the platform can be regularly expanded by customers if, for example, additional clouds are needed (Consultant CE, 106; Consultant GO, 107). Based on their experience from various projects, they mentioned that customers should not try to map old processes in the new system, as this brings old burdens (Consultant GO, 195). In terms of data security, customers had more concerns than consultants (Zissis & Lekkas, 2021; Client CM, 153; Client SG, 154) and mentioned that, in retrospect, they should have prepared their legacy data better to save time and costs (Client WP, 215; Client DJ, 216).

In summary, the consultants and clients have mutually met their expectations and the clients are satisfied with the final product. Nevertheless, as the discovery phase is important for the overall process, and can lead to serious problems, an in-depth kick-off meeting can help to eradicate that problem (Besner & Hobbs, 2006; Fullerton & West, 1996). Clear communication between consultants and clients, executive support, and achievement of incremental successes were identified by clients, consultants, and the literature as key success factors (Appelbaum & Steed, 2005; Clients & Consultants, 188-193; Clients & Consultants, 199-203).

5.5 Relevance for the Management

Managing customer relationships is becoming increasingly important and adapting to new circumstances is essential for companies to stay competitive (Blanchard, 2010). Using CRM solutions such as Salesforce can be helpful for a company's long-term success. To be able to ensure this, the implementation must be structured and planned.

A change process always challenges companies, with unpredictable problems. For this reason, the results of the paper provide companies with an overview of what they can achieve through Salesforce and what obstacles and risks they might face. The suggestions and recommendations can be used by companies to prepare for a successful Salesforce implementation. Employee resistance, as in most change initiatives, is a major issue in Salesforce implementation, on which a focus must be placed.

5.6 Limitations and Further Research

Although qualitative research in the respective field is the best suitable approach according to the selected literature, it is also necessary to recognize the disadvantages such as limited generalizations and subjectivity of the findings. The chosen data analysis method for the qualitative research, namely content analysis, offers only limited quantitative information about the results due to the frequency illustration of the results, hence, limiting the amount of generalization of the results. While it was possible to create frequencies that highlight the importance of individual statements, no in-depth statistical quantitative analysis was conducted due to the limited time frame and word limit of the thesis. Moreover, potential additional quantitative research could confirm or disconfirm the present results but would fundamentally lead to extended generalizability. A quantitative method could be carried out through a survey, whereby a larger sample could lead to a higher degree of generalization and objectivity of the results (Bernard, 2017). The questions could be presented in the form of a multiple selection list based on the factors identified in the qualitative analysis of this thesis. In addition, an open box field for additional answer choices not previously covered by the qualitative analysis may provide further insight. This would add strength to the findings of this thesis through a higher sample size. Moreover, bases on the findings of the current interviews, I would conduct further interviews with more technical questions to more thoroughly highlight the differences between Salesforce over competitive products and form recommendations on how to prepare to use the system. In addition, there were only a limited number of interviews. In order to get a broad understanding of the topic, both clients and consultants were interviewed. The clients come

from different sectors and only people from the countries Germany and Austria were interviewed. This may lead to the assumption that there may be a distortion of the results. Nevertheless, the results do not suggest this, as all interview partners spoke of a predominantly successful or very successful implementation and similar information was provided. However, in order to draw lessons from negative examples and to be able to generalize, further interviews would have to be conducted. A larger sample could lead to different results and provide more certainty compared to the results obtained here.

An average interview length of about 30 minutes, which could usually not be exceeded due to scheduling reasons, leads to the assumption that the respondents were not able to answer in sufficient detail. For one client, the project had already taken place several years ago, so she could no longer remember the details.

Due to the importance of customer relationship management in today's world, Salesforce provides sufficient need for future research in the area. This means that an additional study on the same topics could be conducted using a quantitative research method to provide more generalizable results or new topics and deeper insights about the implementation process could be discussed.

6   Conclusion

The following chapter summarizes the key findings obtained from the interviews and the existing literature and explain the relevance of the findings for the management. In the end the limitations of the paper will be mentioned and thoughts on further research shared.

6.1   Key findings

Companies today need to adapt faster to the ever-changing business environment in order to stay competitive. The use of modern technologies and advanced systems is becoming more important to increase efficiencies and productivity. With the growing competition and the increased demands of customers, it is important for companies to build and maintain a good customer relationship.

Salesforce offers companies a CRM solution for managing customer relationships. All departments, such as marketing, sales, customer service and retail, work together on the platform, which allows them to have a common view of their customers and provide the perfect customer experience.

At the beginning of the thesis, three research questions were established that determined the structure of the paper. The first question deals with the benefits and opportunities that arise for companies through the implementation of Salesforce. The second focuses on the obstacles and risks that companies face during the implementation process and the final research question relates to the actions that need to be taken to make the implementation successful.

Using Salesforce, customers can access the platform from any internet-enabled device. By collecting customer data and connecting external data resources, a 360-degree view of the customer is made. Among other things, companies can obtain customer-specific information and use it for marketing purposes, for example. Furthermore, it offers companies the opportunity to analyze the data obtained using integrated analysis tools and, for example, to make better forecasts. Since Salesforce is low-code or no-code based, users can easily customize the platform. Salesforce also has three release cycles per year, in which improvements are made or new tools or technologies are integrated into Salesforce.

However, such an implementation process, which is also a change process, also involves risks and obstacles, which are stated in the interviews. According to the literature, the most common reason for failed change initiatives is employee resistance (Will & Pies, 2018). This reason was also reflected in the interview results. To minimize this, interviewees mentioned the importance of open, transparent communication and involving necessary employees in decision-making processes. Communicating a vision, demonstrating the benefits of the system with specific use cases, also promotes acceptance (Kotter, 1995).

Other obstacles include poorly managed legacy data and user lack of knowledge about the system. Therefore, employee training is essential. The scope of such an implementation can also be quickly underestimated, which would lead to higher actual costs. According to the interviews, the implementation process should be approached step by step in order to achieve continuous improvements and not to overburden the employees. According to the literature, people have a tendency to underestimate the time needed to complete their tasks (Buehler et al., 1994). In the literature, and the interviews, it is mentioned, that the time planning should be approached rather pessimistically in order not to work under time pressure (Koole & Spijker, 2000). To avoid planning errors, it is recommended to divide the tasks into small subtasks (Forsyth & Burt, 2008; Consultant DB, 167). The entire process should be hybrid-agile by incorporating feedback loops to improve the use of the platform.

6.2 Take-away message

Customers' demands on companies have changed significantly in recent years. Due to strong competition, they have become increasingly demanding. With the help of Salesforce, companies have the ability to collect, centrally manage, and intelligently leverage information about their customers to better meet their needs. Using the no-code/low-code configuration, companies can build their business on a secure and scalable platform. With the AppExchange, for example, they can easily extend Salesforce with applications tailored to their industry.

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Appendix

Appendix A: Interview Guides

Interview Guide Consultants

1. Good morning/afternoon XYZ. (Informed consent form)

2. Salesforce is a software to manage any intersection with customers, etc. using cloud technology. Could you please tell me quickly your role in the implementation process of Salesforce?

3. What drives companies to implement Salesforce in their company?

    3.1   What was the situation that created the need for companies to implement Salesforce?

    3.2   In general, what is the customer's goal with such a project?

    3.3   Does Salesforce have an impact on managing customer relations? (If so, which one?)

4. What role does customer relationship management play for companies in today's competitive environment?

    4.1   Is technological development in the area of customer-centric processes important?

    4.2   What advantages or disadvantages does it offer?

    4.3   Does cloud technology influence the work with the customer?

5. How does such an implementation process, which is also a change process, work in companies?

6. Do companies face any obstacles/challenges?

    6.1   What was the general acceptance of the employees towards the new CRM system?

    6.2   Was there resistance to a technological change process? Can you report on this in a little more detail? (If so, did it change? How did it change?)

7. Are there factors that lead to a successful implementation? (If so, which factors?)

8. Did the implementation create risks for companies? (If so, what risks?)

9. Are there any business-side benefits for companies from the implementation? (If so, what benefits are there?)

10. Do you see any opportunities for companies in the long term? (If so, what opportunities?)

Interview Guide Consultants

1. Good morning/afternoon XYZ. (Informed consent form)
2. Salesforce is a software to manage any intersection with customers, etc. using cloud technology. Could you tell me quickly which touchpoints you had with Salesforce?
3. What drove you to implement Salesforce?

    3.1   From what situation did the need for the project arise?

    3.2   What was the aim of the project?

    3.3   Why did you explicitly choose Salesforce?

    3.4   Does Salesforce have an impact on managing customer relations? (If so, which one?)

4. What role do customer-centric processes play for companies in today's competitive environment?

    4.1   Is technological development in the area of customer-centric processes important?

    4.2   What advantages or disadvantages are offered by technological development?

    4.3   Does cloud technology influence the work with the customer?

5. How did the implementation process, which is also a change process, work in your company?
6. Did you face any obstacles/challenges?

    6.1   How was the general acceptance towards the new CRM system?

    6.2   Was there any resistance to a technological change process? Can you report on this in a little more detail? (If so, did it change? How did it change?)

7. How would you rate the implementation? (Not successful, mostly successful, very successful)

    7.1   What factors, if any, led to successful implementation?

8. Did the implementation create risks for you personally or for the company? (If so, what risks?)
9. Are there any business-side benefits for companies from the implementation? (If so, what benefits are there?)
10. Do you see any opportunities for your company in the long term? (If so, what opportunities?)
11. What learnings did you gain from the implementation of a CRM system?

12. In retrospect, would you do anything differently based on the experience you had during implementation?

Appendix B: Interview Summary

In the following, the codes and respective themes will be displayed. The data has been clustered into eleven overarching categories and a description of those categories is provided. The number (see #) is used as a reference medium in the thesis.

#	Frequency	Identified sentence	Sub-category
Category: Reason for implementation			
Category Description: Reason for the need of the project/ why companies implement Salesforce			
1	5	"So from experience, I think on the one hand it's process optimization, the desire to digitize, which probably stems from the fact that you also get data through digitization and can therefore perform data-driven optimization. […]That means optimizing sales processes, getting more insight into why things are going well, why things are going badly." - Consultant DB	Desire to digitize
2		"Ultimately, however, there is always a desire somewhere for a tool to digitize or simplify or optimize processes that have to do with customer data somewhere." - Consultant OA	
3		"The next reason was of course also improved management of processes and workflows […]." - Client WP	
4		"[…] Salesforce has a great brand and promises the opportunity to modernize the entire customer IT infrastructure and be ready for the next decades." - Consultant LR	
5		"It simply needs channels or platforms that really do that or that you really use to provide customers with information on an ongoing basis." - Consultant MK	
6	3	"[…] My experience so far has always been that this is usually a top-down decision.[…]" - Consultant OA	Top-down decision
7		"And that's why our founder knew Salesforce and said that the system we use will also be Salesforce, i.e. the choice of system, the decision, was actually already clear to us." - Client MB	
8		"I don't have that at the moment. I saw that at a previous company. I had Salesforce there and now I want to go back to Salesforce" - Consultant CE	
9	3	"[…] There were many subsystems around the team system that had to be implemented. And yes, there was no uniform system, i.e. for the group worldwide, and that's why it was actually necessary to do something there. […]" - Client WP	Unified system / harmonization
10		"And it became increasingly urgent that this information be available to our customers worldwide and that the processes be harmonized." - Client DJ	
11		"[…] to create the basis for the international rollout in order to harmonize the sales process." - Client CM	
12	4	"Decision-making processes that are relatively complex [...] have to be mapped because they have to be tracked in sales and that has been outdated [...]." - Client CM	Had outdated CRM system
13		"The first thing was that we had a legacy system. That was an old one, AS400, a mobile data collection device and a planning tool that was also custom programmed." - Client HP	
14		"The next step is that there is an existing CRM system, but it is getting on in years and can no longer do what is expected of a CRM system these days." - Consultant LR	
15		"The project was actually started because the old CRM system had been in operation for more than ten years. Support had basically expired there." - Client WP	

#	Frequency	Identified sentence	Sub-category
colspan		**Category: Goal of Implementation**	
		Category description: What the project focuses on	
16	3	"[…] centralize the management from the sales representative, that this also does not disappear with a sales representative when he leaves." - Consultant DB	Centralize
17		"[…] I would like to have the sales figures on a dashboard of all countries at the push of a button." -Consultant CE	
18		"To implement the complete maintenance structure, so all the data that we need for mobile, for technician control, and also for plant control, in Salesforce and of course integrate it with the other streams." - Client HP	
19	3	"[…] Increasing efficiency and somewhere also customer satisfaction in itself. […] You also notice that companies have now realized that it is much easier to practically upsell and retain existing customers than to simply focus on acquiring new customers. […] Making things as efficient as possible and ultimately also as cost-effective as possible. This intersection between cost efficiency but also efficiency in the sense of generating the maximum output... but still keeping the costs as low as possible." - Consultant OA	Improvement of efficiency and customer satisfaction
20		"Head of Sales wants to see all his sales people on a dashboard, how they are doing. Maybe the one who is performing the best, the one who is probably underperforming a bit, the one who needs a bit of support. How can you support him? Where are the problems, how can I support them?" -Consultant CE	
21		"And the optimization I would say of customer satisfaction in general terms" - Client WP	
22	1	"So basically, customers want to be able to collaborate better and they want to have simple interfaces. And of course they want to save time. And time, as we all know, is money. And what's a particularly important thing is companies want to be data driven. And often companies don't have the data to make smart decisions." - Consultant LR	Better data, collaboration
23	1	"[...] in my opinion, also much more targeted marketing [...]" - Client SG	More targeted addressing
24	1	"Transparency. So a lot of customers want to know exactly what we are doing de facto, where we are right now with work order fulfillment and with the current processes [...]" - Consultant BL	Transparency

#	Frequency	Identified sentence	Sub-category
		Category: Role of CRM	
		Category Description: The importance of Customer Relationship Management nowadays	
25	4	"[…] The technology should always follow the customer's needs. In other words, the technology is actually only one way of ultimately solving the customer's problems." - Consultant OA	Customer is the center
26		"And also a lot of small suppliers then come up with ideas that are perhaps more focused on the needs of the end customer and snatch the customer away. And often it is the missing or something that companies lack, is simply the customer relationship and also the customer knowledge to be able to simply also really react to the needs of the customer." - Consultant MK	
27		"So that you can practically focus on the customer to cover your own business strategy, etc., and also have the opportunity to practically have super profitable customer relationships from that." - Client WP	
28		"And that's why a CRM system is so important, because without customer centricity, no company can or will be able to survive in the future." - Client DJ	
29	5	"You no longer want to be addressed the way everyone is addressed, but somehow expect to be addressed individually here. And you really want to be addressed as an individual person, as an individual customer, and no longer as one of 1,000." - Consultant OA	Individualism
30		"There is a whole range of companies, which means that there is usually always a substitute option." - Consultant OA	
31		"In the meantime, that has become much stronger, so the demands of customers have increased and so have the demands on companies to have all this data and information available, to be able to offer customers a personalized experience that is tailored to their needs." - Consultant GO	
32		"You have to address the customer on all channels, preferably in person. And that is super important." - Client SG	
33		"We believe that these customer-centric processes are very important, because of course every customer is individual and wants to be treated and processed individually." - Client SR	
34	1	"No matter how good your product is and what great channels you have and how satisfied your customers are, if you can't use all of this information to pick up the customer at any point in time when they are with you. Then you will rather have a competitive disadvantage." - Consultant GO	Use available data correctly

#	Frequency	Identified sentence	Sub-category
		Category: Customers today	
		Category description: How customers changed nowadays	
35	2	"This has become so that studies say that a customer now leaves the company after a bad experience. A few years ago, that was still the case: customers had to have three bad experiences to leave a company. Now it's much stronger. Customers' expectations have risen, and with them the demands on companies to have all this data and information at their disposal and to be able to provide customers with a personalized experience tailored to their needs." - Consultant GO	Development today
36		"Customer expectations have changed in the sense that nowadays a customer wants to be served in a completely different way than was perhaps the case 20 or 30 years ago. We are now in a market where the customer has a lot of power. So there are, there are quite a few companies where there is normally always an alternative option." - Consultant OA	

#	Frequency	Identified sentence	Sub-category
		Category: Benefits (1/3)	
		Category description: General benefits & the advantages of cloud-based CRM compared to on-premises (Server) CRM	
37	4	"The big advantage of a cloud-based focus is, of course, that: firstly, scalability […]" - Consultant OA	Greater scalability
38		"And a very important point is scalability." - Consultant GO	
39		"[…] then scalability of such systems […]" - Client WP	
40		"[…] then there is the good scalability that you then have […]" - Client BL	
41	8	"This permanent storage or this. Company-wide possibility to have an access to this customer. That is of course a big point and there is of course then, there you have of course cloud based many possibilities [...]" - Consultant OA	Cloud-based is available from everywhere at any time
42		"Then it just changes the management of the contacts so that it becomes permanently available for the company. The history is there". - Consultant DB	
43		"Firstly, it is available 24/7." - Consultant GO	
44		"Of course you can access it anywhere and anytime, even if you don't have your laptop with you" - Client SR	
45		"[...] the possibility to work with the system from anywhere […]" - Client WP	
46		"[...] many who work in the field may also want to capture their data on the go, may not want to work with any pieces of paper, may also want to enter that on their tablet or their laptop and then don't want to sort of, as it used to be, transcribe the notes in the office or in the hotel room and then enter them into a system." - Consultant CE	
47		"The whole thing is on-demand. This means that I can also enter my data in the car, which is of course a total advantage." Consultant LR	
48		"Because Salesforce but also our contact center is based on the cloud and you can therefore guarantee access from everywhere." - Client MB	
49	3	"In terms of security, Salesforce is very strong on having appropriate ways to protect customer data." - Consultant OA	Focus on data Security
50		"[…] more secure, more performant, more available than I can usually afford as a company to design myself." - Consultant GO	
51		"And everything is actually solved centrally. So all these cybersecurity issues are solved centrally and that prevents or makes it obsolete for me to hire any cybersecurity specialists myself." - Consultant LR	
52	3	"In a second step, that's exactly what happens when I'm in a cloud technology, so I have continuous improvement." - Consultant GO	Continuous improvement & add-ons
53		"and the extension possibilities for such systems exist, due to these add-ons." - Client WP	
54		"Salesforce actually has this concept of the AppStore. […] But essentially, Salesforce has exactly a Web Exchange, which is nothing more than people around the world building additional solutions based on Salesforce technology that are built on and integrated with the Salesforce platform. And so for all the problems that I have, I have the possibility of actually finding solutions in this App Store. " - Consultant GO	
55	1	"And of course to just reduce this whole issue, the server downtime and this and that respectively." - Client SR	Less frequent server failures in the cloud
56	4	"But I definitely think that this is also about data-driven process optimization and quantifying customer relationships. That means having all the information that takes place in such a process in a database and then being able to analyze it." - Consultant DB	Quantify and analyze data
57		"You have digitized processes, you can quantify what is happening where." - Consultant DB	
58		"That an integrated reporting engine is included, where I can easily generate reports or even create dashboards." - Consultant GO	
59		"I think it certainly benefits everybody. on the one hand, through the dashboards that we've been able to pull from the whole company. So all the reports that we just see now. That's where we really see where we have improvements, where we still have the opportunity to tackle. The second thing is that we can really confront the customers with what market situation we find, for example. So really black on white." - Client SR	
60	11	"In the case of Salesforce, I would add that you have the ability to customize very quickly." - Consultant DB	User friendly & customizable
61		"Because the whole tool is built very user friendly for the end user" - Consultant OA	
62		"You really have a possibility to get to know your customer very well through the core product and through various other products that can be linked to it." - Consultant OA	
63		"This is possible and can be adapted extremely quickly with Salesforce when a change occurs in the company." - Consultant CE	
64		"[...] the second is the usability. I think there it is a lot higher than many of the other. Also going along with that, that they actually come so CRM world and not from a finance world, which has a very different perspective. Flexible is a low code, no code product, which means that so many people who don't have programming skills can make adjustments very, very quickly and make automations with it." - Consultant GO	
65		"All this means that no classical IT knowledge and thus also allows that super users, business users accordingly can make adjustments much easier with the tool." - Consultant GO	
66		"Yes, so the USP of Salesforce is definitely that Salesfroce is much more configurable. So Salesforce is really a highly configurable software." - Consultant LR	
67		"Definitely usability, i.e. user friendliness[…]" - Client CM	
68		"[…] the whole interface, the whole usability, how intuitive it just is, how easy it is there, certainly played into that as well." - Client SR	
69		"[...] more or less by means of drag and drop in the background changes to everything would have been or were possible." - Client TV	
70		"Salesforce is a modular system." - Consultant BL	

#	Frequency	Identified sentence	Sub-category
		Category: Benefits (2/3)	
		Category description: General benefits & the advantages of cloud-based CRM compared to on-premises (Server) CRM	
71	4	"You have your customer knowledge, your customer relations. You have them in a system and not just with the employees. That means you don't lose anything if an employee decides to leave. You have documented your data and the transactions, contacts between customers and sales people." - Consultant DB	Centralized data
72		"In other words, a call can be made to a call center, anyone who has access to Salesforce can then find out this record. And can say exactly okay, this is practically the history behind it and can then really continue to work on this account in the same quality as anyone else can." - Consultant OA	
73		"We approach the customer in a much more coordinated way and as the right hand. The right hand always knows what the left hand is doing, and that of course brings a lot of benefits, because you simply approach the customer and the customer notices that they are coordinated." - Consultant LR	
74		"[…] All customer communication is visible to everyone at a glance." - Client HP	
75	6	"You have much stronger or much better ways to report and identify risks and then address those accordingly. You then have the opportunity to make targeted marketing approaches. Make appropriate segments and make your marketing much more efficient." - Consultant OA	Better reporting, service, performance
76		"There are also KPIs: 25% less costs, running costs on hardware, faster and better sales, targets, etc." - Consultant CE	
77		"And, of course, there are gains in efficiency, gains in revenue, improved working conditions, and more opportunities to help businesses grow." - Consultant LR	
78		"I think that everyone involved in the system now has just-in-time information that they need for their daily business. Many processes are also mapped via workflows, which means that it makes work easier and simpler." - Client WP	
79		"We have the benefits through increased productivity. If we look at how we serve the different channels, we can figure out which channel is the most efficient with the best rate, so with the best customer rating. […] I can rely on the Einsteinbot to run well within chats and WhatsApp, for example. And I know that these channels are super connected in the Omni Channel to prioritize my tickets, to prioritize my channels. I can make sure that my process builders, flows, etc. trigger when they're supposed to trigger." - Client MB	
80		"So a couple of the big acquisitions in the last few years by themselves that is for example that they bought the best communication software for IT projects, namely Slack, and successively integrate these advantages also into their own software. They bought Tableau, one of the best data visualization platforms, and are now integrating it into Salesforce. They have bought Mulesoft, one of the large and strong middleware providers. And so they are successively expanding the portfolio. Before that, marketing. That's where they bought solutions. They have bought solutions in the area of commerce, so the webshops and also their own development does not stop there. Net Zero Cloud is a good example. It arose from the fact that they presented their own carbon footprint accordingly on their platform and defined it as a product that is now entering new areas." - Consultant GO	
81	2	"Salesforce has of course covered many different industries, i.e. developed its own solutions for a wide variety of industries in terms of Health Cloud, Automotive Cloud or various other topics […]" - Consultant OA	Usable in many industries
82		"And I'm in a technology that's always evolving, that's always moving into new areas." - Consultant GO	
83	9	"[…] 360-degree view of the customer, and that's where Salesforce is very strong, of course. I don't know of any other product that really focuses so much on the customer." - Consultant OA	360 Degree View
84		"So the end result is that you have a profile of the customer with, with different, with different data sources […]" - Consultant OA	
85		"Yes, essentially you can say that now the move is to a modern CRM solution like Salesforce, which is a cloud solution that allows you to do 360 anytime, on any device […]" - Consultant GO	
86		"So no matter if he called the service center, if you talked to the sales person, if he ordered something online in the commerce store, if he complained about something, if he emailed something in or called, that all these omni-channel and across touchpoints need to be available in one place so that every time anyone interacts with the customer, that has that available to them accordingly." - Consultant GO	
87		"And this Customer 360 View actually helps to make every interaction easier. And that actually leads to increased customer satisfaction and customers return more often and, of course, time is saved in all areas. And the addition of these hundreds of advantages that come about with such a software implementation. In the end, this also leads to an increase in sales. [...] when you really know everything about that customer. And in the past, it was actually the case that you had silos in the companies [...] Customer 360 Degree view actually means that I have all the information about the customer in one place and in one program. [...] And that is, for example, this Customer 360 Degree view, which allows you to make better decisions and use better tactics, just by being informed." - Consultant LR	
88		"To me, 360 degrees of looking at the customer is to say that you really have the information from the customer on different channels or at different touchpoints. [...] A customer no longer stays on one touchpoint. Time is up. The customer goes through an incredible number of touchpoints, and speaking of a customer journey, it can be the wildest customer journey on earth, as you think. But you quickly realize that this is the new normal." - Consultant MK	
89		"By having a 360 degree view from our sales rep, through the technicians, through phone pre-sales and also a full 360 degree view of the customer's. [….]" - Client HP	
90		"That you have a 360-degree view of the customer, so that you know as well as possible when the customer was where? Which channels did he use? Did he read emails? Has he been on the website? Does he already drive a vehicle to talk to us specifically? Or does he already have the product we sell or distribute? " - Client SG	
91		"That I really know about the sales process, about marketing topics, about service, about support. I know at all times what is actually going on with the customer, so to speak." - Client WP	
92	1	"[…] has, of course, a wide pool of people who are familiar with the technology." - Consultant GO	Salesforce has a big pool of knowledgeable people

#	Frequency	Identified sentence	Sub-category
colspan		**Category: Benefits (3/3)**	
colspan		*Category description: General benefits & the advantages of cloud-based CRM compared to on-premises (Server) CRM*	
93	5	"You also have to communicate clearly to the customer that this is an out-of-the-box application that is very, very flexible." - Consultant CE	Flexibility
94		"Essentially, the focus is always on serving the customer better, selling more to the customer, giving the customer a higher, better, and higher level of service, giving the customer more flexibility in how we communicate with the company, how they bring in their concerns, how they find out what the status of their concerns of all kinds is, so they get that right on push, on their own mobile." - Consultant GO	
95		"And the USP of Salesforce is really: I am one hundred percent flexible. I can expand into all customer-facing processes, be they marketing processes, be they service processes, be they sales processes, be they customer portals, be they many service processes, be they apps. I can go in all directions, and the other software doesn't give me this flexibility and this freedom." - Consultant LR	
96		"Of course, these standard processes are also tool-based. But precisely with the flexibility that we can then respond variably and flexibly to one or the other customer." - Client SR	
97		"Because Salesforce could do that and none of the other vendors could. It gave that flexibility." - Client TV	
98	3	"From my point of view, cooperation is much easier. It is much more transparent. It is the possibility of communication and cooperation, the so-called in organizational theory, the so-called integration of the company works much better." - Client CM	Transparency
99		"That means we have full transparency, what does the customer get, what does he deliver to us, what are the services we gave him." - Client HP	
100		"And I just think the transparency that we have about the customers. what information we all have in one place about the customer is really just gigantic and helps us enormously to understand the development of the customer. Where does the customer stand, what problems does he perhaps have?" - Client SR	

		Category: Barriers	
		Category description: Reasons that negatively effect the Implementation process	
#	**Frequency**	**Identified sentence**	**Sub-category**
111	11	"A year ago, I still experienced acquisition situations where this was a problem because IT, IT management, tends to think conservatively when digitization has not yet taken place. These are people who have worked with servers and then don't want to have the data more or less somewhere else and don't have the full rights." - Consultant DB	Resistance
112		"Of course, it is a major change process. This means that at all levels there may be people who were satisfied with what was already there anyway, who have simply come to terms with the process that exists. If a routine has worked before, no matter how ineffective, it is something that is met with resistance." - Consultant DB	
113		"[…] The people who use it have probably already adjusted to another tool, have worked with it for years, maybe even decades, and then suddenly this tool is taken away from them. And this tool is also the backbone for the work.[...]you might have an employee who's been with the company for 55 years now for 15 years and has always done it in a certain way task, always done it in a certain way [...]he's probably more skeptical of the technology."" - Consultant OA	
114		"I think with any change there are employees who are against it, that's what change management is for." - Consultant GO	
115		"And people are actually going too fast with technological change and getting stressed out by it. […] And resistance to change is an issue we face again and again in companies." - Consultant LR	
116		"People are creatures of habit. And if something new comes along and is also connected with technology, then I believe that many, many employees will say "Hands off me!" - Consultant MK	
117		"It was simply not called resistance so open. It is so now not open, but of course there are those who simply do not use it ." - Client CM	
118		"Older employees in particular have a problem with this." - Client HP	
119		"At the beginning, as I said, also a bit critical, of course. That's always the case when new products come along and bring with them many promises. […] Of course, there is resistance to this and also the desire for standardization […]" - Client SG	
120		"Well, the joy of colleagues, especially in sales, was not the greatest." - Client DJ	
121		"Very skeptical. So of course you're always in a clinch here with the fear of the employee, especially the technician. And we have always had to explain at every location that the human being is not being replaced by this." - Consultant BL	
122	2	"Or the existing employees have to retrain and there is more or less still no benefit for them that they have less work." - Consultant DB	Retrain
123		"But this also means that employees have to learn something new again and again. They have to get involved with new processes and a new tool." - Consultant GO	
124	2	"You can have a mandatory field, but everyone kind of puts something else in there. That is, the service or the store employees really just fill in something that something is in it. Of course, if the data, for example, is not inserted in the appropriate quality by the staff, then in reality the data is far less valuable than it could actually be" - Consultant OA	Poor data quality
125		"And the second thing was certainly also, let's say, legacy data. We had legacy data from the old CRM, but we realized relatively quickly that the quality of the data was not optimal. " - Client SR	
126	1	"So you're measured by how many, how many contracts or whatever, how many cars whatever it is that you sell. But you're not measured by how cleanly you maintain your CRM system now, in most cases." - Consultant OA	Tool is not priority
127	3	"Obstacle is rather beforehand in the selection. That is I think the one that are the biggest obstacle concerns are Fear, maybe a little bit, a little bit of lack of knowledge." - Consultant CE	Fear of being substituted
128		"[…] that these employees have naturally seen their jobs being rationalized away.[…]" - Client HP	
129		"And some, I would say colleagues, feel a little bit "attacked" or feel a little bit not directly cannibalized, but then you realize that you have to do a lot of educational work." - Client SG	
130	1	"There are people who say I don't want to be controlled. Why should I enter all my appointments? These are my appointments." - Consultant CE	People feel controlled
131	1	"I see this as a major obstacle, that often qualified personnel is not available to the companies and, in order to be able to implement it at all." - Consultant MK	Lack of qualified personnel

		Category: Challenges	
		Category description: Challenges companies are facing during the implementation process and during the Change Management process	
#	**Frequency**	**Identified sentence**	**Sub-category**
132	1	"It starts with that of course they have to provide resources. So the people who know how currently the and the current processes are, which are often the basis of what I would like to have as scope." - Consultant GO	Available resources
133	3	"One should not forget that companies or employees often do not have the time to learn something new." - Consultant MK	Lack of time
134		"Of course, it's always the time factor that's a bit of a pain in the neck, so to speak. Let's put it this way. So that was certainly a bit of a hurdle." - Client SR	
135		"In many projects, time pressure is always an issue. You put off decisions for a long, long time and then suddenly everything becomes very urgent and hectic." - Consultant GO	
136	3	"In every project, of course, there can always be technical challenges. With integration topics, for example, where Salesforce has a very open platform that enables data to be integrated via a wide variety of paths and APIs and other technologies, I have a whole battery of systems on the other side that may not have these options. So where I may even be forced to purchase middleware, implement it in this way, adapt it to my needs." - Consultant GO	Technical challenges
137		"Not to mention the technical challenges that come afterwards. Most of the time, after all, you're still in uncharted territory. So how do I integrate a system now, have I chosen the right object structure now. Is the data model the right one? How do I synchronize all the data? Do I still have to be compatible with the processes that were there before? How do I document the whole thing and how do I then train the agents on this conversion process? "- Client MB	
138		"Which people are allowed to have which rights, which people are allowed to see which content? Some people are allowed to see that, others are not allowed to see that. And that was more or less a matrix of people from different countries. Are they allowed to see different challenges? Some are allowed to see it, others are not and then sometimes they are mentors in several programs and then everyone had to see it." - Client TV	
139	1	"Because as always, when people talk to each other, yes there is a communication, sender and receiver, that documentation was not there, you do not talk about the same thing, have had different interpretations, so a whole battery of challenges." - Consultant GO	Communication
140	1	"Again and again in the project you have to decide: Do I do A or B? Because I have a kind of triangle, I have a budget, I have costs and I have time. And if I turn one at one of these points something without the others, like I want to have more, more quality, then I can only do that if I end up having more time again to do the thing, the same thing. Or maybe I have more budget. And in this area of tension, it is also important to have these clean mechanisms in order to make the right decisions for these challenges.." - Consultant GO	Management Decisions
141	1	"I think the challenges are mainly when you think you have understood what you are building or need to build. And the bottom line is it's not what's really needed. The hurdles are mainly that you know what you really want to build and that the agent also really knows what he needs." - Client MB	Know what people actually need

		Category: Risks	
		Category description: Potential factors that take the project or the company at risk	
#	**Frequency**	**Identified sentence**	**Sub-category**
142	3	"[…] that you lose employees, including experienced employees who say: No, I don't need a new tool now, I can do this, I'm a super here, I'm a super sales employee." - Consultant DB	Loss of employees
143		"[…] And then they are no longer there. In other words, the employees leave the company." - Consultant OA	
144		"Well, the risk was already that simply many colleagues and colleagues say okay, that's much too much trouble for me. I leave." - Client SR	
145	2	"It is natural, whenever you implement a great technology, you make yourself heavily dependent on it. […] Which in turn means that if you implement something like this now, you probably won't throw it overboard again in a year's time. As a rule, you'll stick with this tool because you're dependent on it somewhere." - Consultant OA	Dependent from technology
146		"Yes, so of course you first commit yourself to either one year, three years, or five years of license costs. And that is of course relatively difficult as long as you are actually getting fixed monthly costs into your house." - Consultant LR	
147	1	"One hears again and again when such a conversion or such an implementation does not happen cleanly. And in the end you have a tool that nobody really knows how to work with." - Consultant OA	Poor implementation
148	2	"At the end of the day, a huge amount of money and resources has been invested in the implementation of this tool. Nevertheless, after two or three years, you might end up with a tool that nobody uses and that nobody really works with.." - Consultant OA	Sunk Costs
149		"The risk would have been just conscience that we would have invested money and time and it just would not have carried out […]" - Clinet DJ	
150	2	"That is definitely a risk. It is underestimated what the process then actually entails for a task." - Consultant CE	Underestimation of effort
151		"There are different countries, there are different processes that are not the same for everyone. And then you have to aggregate on the customer side: What is the solution that works for everyone?" - Consultant DB	
152	1	"So it is that can be budget. It can also be that the quality is not right at some point. This can also have various reasons, because one has not gone far enough in the context of discovery." - Consultant GO	Poor quality
153	2	"But on the other hand, of course, the risk that the information will be seen and that destroys sales." - Client CM	Data security
154		"Risks Definitely in terms of data protection. Yes, we work with much more personal data. Of course, you have to make sure that you have the right consents from customers, etc., and that the processes are covered accordingly. What if someone asks okay, I would like to have data information and I would like to have my data deleted and everything. What the topic of data protection always involves or brings risks with it. Yes, I think that's the main risk." - Client SG	
155	1	"[…] for the company in the sense that it was actually not possible to keep within the budget originally planned for the year. […] There is always a risk that someone will say okay, first we'll break it off like this or then we'll shorten it there." - Client WP	Higher actual costs

Category: Implementation structure			
Category description: The structure of a Salesforce implementation process.			
#	Frequency	Identified sentence	Sub-category
156	6	"So there is a team on the consultant side. Depending on the size, there are project managers, then the requirements team, and then those who implement it: Developers, who also frequently configure in Salesforce. And on the customer side there should also be a project manager, in the best case the product owner. Now it also depends on the size. But the product owner knows what the requirements are. Or he gets the requirements for the features or for the entire project from his team and then defines it together with the side that implements it technically." - Consultant DB	Structure
157		"To recognize in the so-called discovery call, which problem would like to solve with it and then of course already in the back of the mind during this conversation try to evaluate solutions, which are then suitable here.[…]" - Consultant CE	
158		"At the beginning of the whole process is a discovery. That means I have to define with the customer once: What does he actually want to do? Where are his pain points in a first step? What are his business goals? Which strategic goals should be supported with the introduction of Salesforce? […] The second step is then to say to make a prioritization within the project, is then just such a strategic objective. Then you want to have higher customer satisfaction. Do you want to increase the number of customer contacts? Do you want to increase the speed of service resolution, for example? So there are a wide variety of objectives that you can take, but which simply guide the basis. In Discovery, once you have defined the topic area, you start to say: What do different users want to achieve with this? Then, for example, user stories are defined, customer journeys are defined, epics are defined. […]So coming back, discovery is the point where you determine what is to be done in the first place. And then you get into implementation sprints, which are such that the corresponding user stories are implemented one after the other and then regularly tested with the customer." - Consultant GO	
159		"But the core thesis is to produce new results very quickly in two or three week sprints. To learn from this in order to determine that we might push these things into a backlog, i.e. we won't do them now, we'll push them to the back because we've determined that others are more important. And then from there to have a first MVP in the product, where in the context of these sprints is also already tested. So you always test at the same time and don't do a long implementation phase first and then a long test phase. Instead, you look at what's in the sprints and from there you define what will be in the next Release.[…]Usually there is then also an own Hypercarephase, if one does not continue immediately again. Where you fix the bugs in the hypercare phase on the one hand, but on the other hand also read out lessons from the use of this MVP and perhaps take new user stories, which are then worked through again in a Release 1 analogously." - Consultant GO	
160		"And normally a project runs in the Discovery phases, then come the Sprints. So sprint 1,2,3,4,5 and so on. Sprints entail the following increments: Sprint planning, daily stand-up, sprint review and sprint retrospective That's when we actually do a UAT, a User Acceptance Testing. Here, we simply check again: do all the things that we have implemented now stand up to scrutiny? Do the users accept it or do the users still have feedback? And then we actually go into a training session where we actually train the users to do the whole thing. Normally, we do this in a train-to-trainer concept and yes, and then it actually goes into the go-live, where you actually roll out the product. And yes, this is how the implementation normally proceeds and the change process actually begins during the discovery phase."- Consultant LR	
161		"The topics that are dealt with in the sprints are actually the user stories. That means in the discovery phase we discuss the user stories and in the sprints these user stories are then worked through. So these are really small, inherent user stories that are worked through. And in a sprint, for example, you have a certain number of user stories and they simply have to be executed in this sprint." - Consultant LR	

#	Frequency	Identified sentence	Sub-category
		Category: Actions (1/3)	
		Category description: Important actions & lessons learned from clients and consultants to achieve a successful implementation	
162	5	"So I think success in the implementation phase or requirements creation is related to working directly with the business and preferring an agile methodology." - Consultant DB	Agility
163		"[…] each implementation partner makes the release agile. That means we elicit the requirements, write the small user stories, and as soon as we start customizing them, we tell the customer: Dear customer, please check it, so that you take each portion one by one." - Consultant CE	
164		"We actually recommend going in very agile these days to have something tangible very quickly then [...]" - Consultant GO	
165		"So the implementation process is usually that we work in a hybrid agile methodology. That is not one hundred percent agile and that is not one hundred percent waterfall. So you have rigid parts in the project and you just have parts in the project where a little bit of leeway can't hurt at all. And that's actually where you bring the agile methodology into play." - Consultant LR	
166		"It's a both agile and classic. There are different reasons for that. Be it a blended approach of agile development and classic implementation is necessary." - Client CM	
167	1	"And the phase where you then break these big themes down into smaller ones is actually then where you can make the feature exactly like that so that it adds that value." - Consultant DB	Break down large topics into smaller ones
168	5	"The key user will then be the person who provides the information from his team in the future. There should be one of these in every subsidiary, who should ideally also have the ability to collect the information from his team and then forward it. And this person should also already be part of the team when it comes to refining the requirements or generating new ones." - Consultant DB	People to include
169		"And in this process, you try to identify key people in the company. And here you try to bring along someone who is on fire for the project and maybe also someone who is an opponent of the project. As soon as the opponent is a little bit convinced of that with the so to speak self-promotion for the project and the tool make and accordingly also the change in the enterprise advance and also the critics convince themselves." - Consultant CE	
170		"Yes, so in any case you need a really good management buy in. So you should definitely have all the people on board, from the CEO to the heads of department." - Consultant LR	
171		"We worked with power users who we really took with us intensively on this implementation journey. They were the ambassadors out to all employees. And here we really have these feedback loops:" - Client SR	
172		"And what helped us were primarily the promoters. So when a colleague says, that's good, that works, that's something else again than when I as a project manager or possibly the management says, that has to be introduced." - Client DJ	
173	5	"And to manage that, that you somehow get all the stakeholders on board and get the employees practically used to this new software. The goal should always be that these advantages are not only visible in top management, but are also really felt all the way down.[…] Enable people accordingly and also make them participants in this whole process." - Consultant OA	Involve stakeholder
174		"Of course, there is also the whole issue of involvement. You have to make sure that people who are affected by it, you can't always involve everyone, but you should have people from all the relevant groups in the project, at various stages." - Consultant GO	
175		"It is important to take the people affected along with us on this path of implementation, to inform them at an early stage about what is happening. To really show them the advantages. Explain the Reasons Why. […] So besides the classic I say leadership management I would always involve people who really work with the tool" - Client SR	
176		"Yes, a very big learning is indeed in any case the right project management. The topic of picking up the stakeholders with the training." - Client SG	
177		"So interviews were conducted with the stakeholders who were to be identified there and an attempt was made to bring the external stakeholders on board. And they were then all able to define their user stories." - Client WP	
178	8	"[...] makes all those who work with it somehow also participants and also those on the one hand, who are trained accordingly and gives them the time they need to get used to it and of course also gives them the support." - Consultant OA	Training
179		"Testing, of course, so that they have seen how the whole thing works in advance, before they work with it live. To prepare the appropriate training courses. And there are already very modern technologies, not only classroom training, but one of the key points that we always use in projects is that each person and each role may need very different types of training." - Consultant GO	
180		"I think it takes a lot of training for the employees, especially in these implementation processes, so that they simply find acceptance with this tool. And where the clear advantages are also shown to the employees." - Consultant MK	
181		"We have had support where we have had more or less 24 hour support in addition to training, of course. " - Client HP	
182		"So, as I said, we first did internal training. So I myself informed myself, exchanged information with providers, then extended that to the team and then we actually did trainings with our implementation partner for the areas. I think we had three, four, five trainings with larger groups in December of last year. Sometimes 20, 30 people per training and also 2 to 3 trainings for the whole topic of custom data platform, to get that into people's heads and to show them that something new is coming." - Client SG	
183		"I think it's largely through educational work, for example through training, etc. You say that you pick up the people and that you simply involve them in the whole process. I think that's very important from my point of view." - Client SG	
184		"We have made all the training courses fun, as far as that is possible of course. And that's why we said that this entire change process, not only for implementation, is still ongoing today […]" - Client DJ	
185		"And thus they could also bring in their wishes relatively well and for the complete team has appropriate training on the system, so that they can then also handle it well." - Client WP	

#	Frequency	Identified sentence	Sub-category
		Category: Actions (2/3)	
		Category description: Important actions & lessons learned from clients and consultants to achieve a successful implementation	
186	2	"That you listen to the problems from all departments that are somehow involved and that you and that you address these problems that currently exist accordingly and also try to solve these problems with a with an implementation." - Consultant OA	Address problems of the employees
187		"I would do it that way, that we talk to them to say: Where is the problem? Trust? Fear?" - Consultant CE	
188	6	"[…] that you say: okay, look with the new technology, you have to do this and that differently, but you then also really have these, these significant advantages." - Consultant OA	Clear, transparent communication
189		"I think it takes a lot of training for the employees, especially in these implementation processes, so that they simply find acceptance with this tool. And where the clear advantages are also shown to the employees." - Consultant MK	
190		"And that was, of course, from the transition phase and from communication. You don't lose a job, but you are entrusted with other value-creating tasks. […] and, of course, that employees are also given the feeling that their place is not being rationalized away, but that they are being relieved and can do more value-adding activities. " - Client HP	
191		"[…] and colleagues who are simply having a harder time, who simply need more time, who really need to be told more often why we want to go down this path and that there is no longer a left and a right. Instead, this is the path we want to take together." - Client SR	
192		"Communicate openly a lot. So communicate clearly. What does the system cost per se? Who bears the costs? Who bears the user license costs?" - Consultant BL	
193		"Of course, there is a lot of resistance and you have to start all over again, communicate why you are doing this, pick them up at an early stage and explain what the added value is when you consolidate." - Client MB	
194	1	"Give me maybe five KPIs where we can see that the system is supporting you and you can say that the project was successful for you." - Consultant CE	KPIs for measurements
195	1	"What one should not do is to try to map the actual world compulsively in a modern technology. This usually leads to the fact that one comes then quasi quite far away from the STANDARD and actually old burdens, are only pulled further and further." - Consultant GO	Don't stick to old processes
196	1	""[...] clean project management, where you also manage risks, for example, where you set up issue management accordingly. So as soon as something comes up, you say you're going to assign responsibilities there." - Consultant GO	Issue Management
197	2	"But essentially: one of the essential points is, on the one hand, communication. From the very beginning, those who are directly affected, but also those who are indirectly affected, to already have a communication plan and to put out messages. What do we want to do? Why are we doing the whole thing, what do we want to achieve with it? This is always an understanding of why the whole thing is happening." - Consultant GO	Change Management Stream
198		"And that's why we did this change process from the very beginning. What did we do? We set up a complete communication plan, in other words, we established the routines." - Client DJ	
199	5	"You have to have a long-term plan, you have to introduce things gradually. You can't overload people with a whole system right away." - Consultant MK	Step by step implementation
200		"An iterative process is important. That means not too much at once: small steps." - Client CM	
201		"So we rolled that out with in different waves, because it doesn't work with a big bang." - Client HP	
202		"And an important factor was also this stacked rollout. That means we started with a small region and then added regions of between ten and 20 people in a monthly cycle. And I think that was a huge success factor […]" - Client HP	
203		"[…] really better to start small and then make the tool peu a peu bigger, develop further […]" - Client SR	
204	2	" As I said, you can't just introduce it in one day and say there it is. It's a lengthy process. You have to make people available who can do this, not just five hours a week, but full time. And they have to look after it in the long term. That means you have to move away from: That's something you do on the side." - Consultant MK	Full-time workers
205		"I would before I implement such a system again, someone so one hundred percent for it. To understand the system, how it is structured in the standard, where are the functions of the system, where are the limitations and how far you can go. If this person then understands this, then I would actually only start with the migration and integration, because then you can certainly avoid bending the system. That you add functions that you don't actually need." - Client WP	
206	2	"So I put together a project team. I then took over the lead and also had to take care of the project management. I more or less started collecting requirements. I had a relatively standardized procedure to create activity lists, so that the people could get to grips with what they actually do all day. [...] We then moved on to defining very high and medium process levels on the basis of the activity lists. And then we tried to implement these activities in the software. On the basis of this, we then defined the use cases, so to speak." - Client CM	Project Team
207		"Yes, clearly very good preparation. This means that from the interfaces, from the data transfer between the old system and the new system, a clearly endowed project team." - Client HP	
208	3	"So, that's certainly a process that just needs to be thought through over the longer term." - Client SR	Long-term process
209		"Now, through this experience, you have a much better appreciation of how long it actually takes and how complex it actually is to set and communicate realistic goals. […] I think one thing you do differently in any case is approach the whole thing much more pessimistically." - Client MB	
210		"Another big learning is: You must not underestimate the internal processes when dealing with new topics. […] Yes, I think right from the start the timeline is a bit more generous, that you don't have so much pressure." - Client SG	

		Category: Actions (3/3)	
		Category description: Important actions & lessons learned from clients and consultants to achieve a successful implementation	
#	Frequency	Identified sentence	Sub-category
211	2	"This: it doesn't stay fixed and that for the next ten years, but really get feedback, whether from the employees, female employees or from the customers. To work that back in, to try to get better, to really want to get more information in here." - Client SR	Feedback
212		"[…] we took on feedback loops. We didn't just want to communicate, we also wanted to hear and know what our colleagues were saying. We used promoters worldwide, whom we also fed with information again and again." - Client DJ	
213	1	"And the promises have to be kept first. But little by little, when you come around the corner with use cases and concrete ideas, acceptance definitely increases." - Client SG	Use cases
214	1	"This is not a sprint, but a marathon. And it really has to be managed sustainably, even in the aftermath. And you also have to build up the necessary expertise in-house." - Client DJ	Sustainable Care
215	2	"[…]Yes, the systems, the data, integration or migration of legacy data into such a system."- Client WP	Clean data
216		"And a big issue is that we should have set up our data structures more cleanly in advance. So we could have harmonized this heterogeneous landscape that we had in part and also thought we had harmonized it quite well. We could have done that even better and more stringently, because that was really something that fell on our feet again and again during the project and we had to adjust it." - Client DJ	
217	1	"So it is extremely important that the direction is set from the very top, from top management: People, we have to change, because we can't go on like this, because of course we also want to continue to serve our customers with the best service. And that has to be clarified beforehand. Otherwise, you're just going to meet a lot of people who veto it."- Consultant BL	sense of urgency

		Success evaluation	
#	Frequency	Quotation	Level of success
218	0		not successful
219	4	"Mostly successful I would say." - Client SG	mostly successful
220		"I would say quite well." - Client TV	
221		"I would say mostly successful." - Client WP	
222		"I think we have made a successful implementation so far." -Client MB	
223	4	"I would call it very successful" - Client CM	very successful
224		"Actually very successful." - Client HP	
225		"Very successful" - Client SR	
226		"Yes, so I would rate it as very successful." - Client DJ	

Appendix C: Informed Consent Form

Informed Consent Form

Welcome and thank you for participating in this interview. I, Robin Füsti-Molnár am conducting this interview as part of my Master Thesis at Católica Lisbon School of Business and Economics, under the supervision of Ana Filipa Martinho de Almeida.

Please answer as honest as possible. All answers will be kept strictly confidentially and are anonymous. This means that there will be no way to link your responses to your identity. The information collected will be used for research purposes only. There are no expected side effects of participating in this study. If you wish, you are free to leave the interview at any point in time without providing a reason.

Do you agree to participate in this study by being interviewed by me?

Do you confirm that this interview gets recorded for research purposes only?

Hereby I agree and confirm:

Signature   Robin Füsti-Molnár