

## CRM Implementation in a Software Services firm: a Case Study Analysis

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### Abstract

This study is undertaken to gain better understanding of CRM implementation in software service companies. The literature on CRM gives the impression of being inconsistent. The objective is to uncover the process of CRM implementation. A case study involving a Bangalore based software service firm which had implemented CRM, was done. Semi-structured interview method was adopted for gathering data. The key finding is that effective leadership is critical for CRM success. Also, findings have shown that CRM implementations have been successful and thus achieved corporate satisfaction. The study confirms that the people, process and technology factors are crucial for a CRM program. Software Services companies are emerging significantly all over the world especially in South Asia. These companies operate in a very competitive market and there is a need to distinguish a service from the competition, for endurance. The effective use of CRM systems to improve service, performance, customer satisfaction and productivity is fundamental. However, the process of CRM implementation in the service industry has not yet been studied. The paper outlines a guideline for a flexible CRM program. The value of this paper is that it illustrates how a case study approach can be used to understand the real implementation process by software service firms.

**Keywords:** Software service industry, CRM implementation, Key drivers, Case study investigation

### 1. Introduction

Customer Relationship Management (CRM), aided by technology, integration of technology with business and the process has evolved and adopted faster due to the change in focus of marketing organisations (Harris, 2003). CRM can be defined as a revolving process during which companies interact with their customers, thereby generating, aggregating, and analysing customer data, and employing the results for service and marketing activities (Seybold, 2001). CRM is a tactical business tool that helps marketing departments identify and target potential customers and help set marketing goals by assisting the team to generate increased sales. It can also enable better customer relationships, ensuring that the highest level of service is provided to them. Today, companies across the world are laying emphasis on retaining existing customers since loyal customers are believed to be more profitable. There is a consensual subscription to the theory of establishing strong and long-term customer relationships for business growth. CRM fits perfectly with the need and also the solution.

In spite of the technological advances in recent years and high levels of investment, CRM faces serious difficulties and implementation failures (Arnold, 2002; Doherty & Lockett, 2007; Ragowsky & Somers, 2002). CRM programs experience a range of issues that include poor corporate customer focus, management commitment, change management, and people, technology and process issues (Raman & Pashupati, 2004). Though many surveys and reports have recognised the soaring CRM implementation as well as adoption failure rates, most of the literature does indicate that CRM can provide long-standing benefits for organisations business and its customers (Bohling *et al.*, 2006). Nevertheless certain essential research gaps are evident. To close this gap, one of the primary areas is outlining a foolproof mechanism for a successful CRM implementation. The available literature does not adequately highlight the relationship between CRM technology adoption and customer relationships of a successful CRM program either (Ling & Yen, 2001; Shoemaker, 2001). As a result, the stake holders are left in an indecisive situation due the fragile nature of CRM system. Very few empirical studies concentrated on studying CRM implementation process developing a guideline which could assist other adopters. Against this background, a case study analysis of the implementation of CRM system at a software service company is presented.

## 2. Overview and Background of CRM

The theoretical base of CRM is relationship marketing, customer retention, profitability, lifetime value, and satisfaction created through business process (Chen & Popovich, 2003). The business objective of CRM is increased profit and revenue. Having an effective CRM system in place can add value to the brand while reducing general costs, since it helps organise resources more efficiently. In addition, with reduced costs of sales, productivity efficiency is increased while the better flow of relevant information also adds value to customer interactions, helping to shorten sales cycles. An efficient CRM system has a string database which will support and help establish closer customer relationships, again enabling closer customer loyalty (Greenberg, 2004). In the past, CRM has been defined as a process (Srivastava *et al.*, 1999), a strategy (Davids, 1999), a capability (Peppers *et al.*, 1999), a philosophy (Hasan, 2003), a technology (Shoemaker, 2001).

Effective CRM programme provides some significant benefits such as improved customer satisfaction, greater revenue growth, and increased competitive advantage, as a result of long-term customer retention. CRM often restructures a company's focus - changing investments in winning new customers to retaining existing ones (Yim *et al.*, 2004). CRM helps in improving the processes related to customer management, placing customers at the centre of the organisation, creating a "customer centric" structure (Grant & Anderson, 2002). Companies need to focus on uniform and customised customer interactions across all customer touch points, as well as the ability to forecast customer needs in order to cross-sell and up-sell products and services to specific customers. There is a skewed and incomplete understanding of CRM by the industry, the topic offers huge scope for investigation. Marketing academics have attempted to study CRM from different perspectives and found that there has been no deliberate attempt to consolidate the conceptualisation into a holistic understanding (Zablah *et al.*, 2004). Also, for the fact that, CRM implementation is not straightforward and studies have shown that CRM may often fail to produce the expected results (Peppard, 2002; Croteau & Li, 2003), makes the nascent and evolving nature of CRM a subject worthy of further debate.

## 3. CRM Implementation

Like with all good decisions for technology implementation, the first step for a good CRM implementation is the strategic decision to change or improve business processes in the organisation. Of course, there is the little matter of investing in an improved information system, so the critical first step is top management buy-in and the support of an efficient Project Manager (PM). The project manager needs to be extremely knowledgeable about the internal environment of the organisation as well as the external industry environment, to be able to gauge precisely what he and his organisation are up against. He or she has to be very clear on the customer scenario in their industry- the demands, anticipations, opportunities and threats on the market. Being the point of contact between the software solution supplier and the end users - employees, the PM needs to supervise the project, coordinate the education of the end users and keep the motivation levels high. He or she needs to have the overview of the entire project in order to be able to understand and communicate the development phase of the project, and the tasks in the next development phase of CRM project (Pinto & Slevin, 1987).

There are certain things that have to be borne in mind even before the implementation is started. Smith (2006) points out that organisations need to be aware of where the implementation can go wrong and plan accordingly. Failures could be triggered by overestimating the functionalities of the implementation, inability to integrate the systems vertically so if customers need some data from the back-office, the system cannot help, thus cutting down communication channels. And of course, the biggest threat is the top level management that is not tuned to the new implementation and does not provide the requisite leadership support.

In order that the process is streamlined to meet the objective, the scope of the implementation needs to be defined early on. To keep the process simple, defining a reasonably manageable system that is fragmented into smaller bits of system scope is one good way to do it. Phasing in software functionality over a series of sequential implementations is a significant way of decreasing complexity. In order to lower the risk, it helps if specific customisation is reduced, or even done away with. The biggest factor for determining the application functionality is the business need – clearly laying down the scope of functions to be implemented (Ocker & Mudambi, 2002). The module by module

implementation process approach makes business sense too, if the adoption is in a chunk, there are chances of unused technology capacity and unnecessary business disruption, which ultimately creates losses, failing the payback test (Rigby & Ledingham, 2004).

The first obvious step is securing the commitment of top management to the implementation of CRM as a business strategy. Then CRM can be translated into a strategy that is aligned with the organisation's business strategy. Then the organisation's technical, human, and organisational capabilities need to be analysed, as the rest of the components are being formulated. According to Coltman (2006), the strategy for CRM should be oriented towards:

- Customer management
- Integration and alignment of organisational processes
- Information capture and alignment of technology
- Creation of CRM strategy implementation plan

At the level of technology readiness, as the company becomes more technologically and organisationally advanced, the level of technological complexity that the CRM can bring to the table increases (Alt & Puschman, 2004). There is a specific set of requirements that an organisation needs to have ready before a complex CRM is put in place. It requires the organisation to adopt definitive type of CRM systems (analytical, operational, and collaborative), back operations, front-office applications and software requirements, and systems that run an efficient knowledge management process (Boon *et al.*, 2002; Shang & Ko, 2006; Ocker & Mudambi, 2002).

While top management stakeholder buy-in is critical, it is equally important that the system and process restructuring is communicated to the employees of all levels, covering all functionalities, not only sales and technology. Thus, it is critical to change the business- attitude of the organisation, without which a CRM cannot operate efficiently. Unless the values and culture of the organisation changes, there would not be any shift in mindset towards greater culture centrality (Sin *et al.*, 2005).

The transformation of the organisation's orientation to customer-centric orientation is a key element. A number of factors can be changed to meet the need of CRM implementation (Boon *et al.*, 2002; Curry & Kkolou, 2004). The organisation could initiate the redesign of communication systems between the custom facing and back-office operations. Emphasis could be placed on the culture of customer –centricity to become the objective of all official functions. Teamwork and collaboration would be essential for each project and any resistance to the new paradigm of the workplace needs to be dealt with.

In their interactive research approach, Payne & Frow (2006) identified four main implementation areas.

1. CRM readiness assessment – needs to be done in a pre-implementation stage, to assess if the organisation is ready for a defined CRM system implementation. This would be the stage where senior management buy-in would be critical.
2. CRM Change Management – In order that a large scale and complex CRM implementation be accepted and successful within a company, a sea change in organisational and cultural behaviours is required. Hence, a critical dimension of any large CRM program implementation is an effective change management program.
3. CRM Project Management – As with all projects, CRM project management plays an increasingly significant role as the size and complexity of CRM initiatives increase. In most instances two main types of implementation teams can be identified: Where a team of specialists are brought together on a temporary basis to address a particular project with a finite completion date. Where the user organisation puts together its best technology and sales brains in a team across functions gets the blessings of the top management, forming a significant part of the CRM initiative. Whichever the case may be, a successful CRM project implementation is one that will help the organisation achieve business objectives, thus supporting the entire business strategy.
4. Employee Engagement – finally comes the deep significance of employee engagement to support the various initiatives that comprise the overall CRM program. The role of employees and their acceptance of the CRM processes and implementation activities are crucial for a successful implementation.

According to Crocket & Reed (2003), for an implementation to be successful, the organisation concerned needs to do a detailed analysis on the industry best practices and whether they can be adopted by the organisation. The key steps for a successful CRM implementation would be:

- Have clarity on where the CRM stands, and how it can become a part of the organisation's business strategy, not as an implementation but as a strategic tool.
- Asses the technology, processes and people capability for the new step.
- Ascertaining if there is a good enough business case to implement a new application that will realign the entire organisation. Understanding that it cannot be just another new toy.
- After these assessments, a new implementation plan needs to be created that would define the goal very clearly, explaining how to achieve and how to exactly go about achieving it.

Chen & Popovich (2003) proposed an implementation model in the context of customer- centric, enterprise-wide, technology and cross functional integration. This model is based on the three important factors- people, process and technology. The people factor highlights the importance of top management commitment and organisational change, the process factor emphasises the importance of organisational process change and the technology factor discusses the evolution of the information technology and their importance.

Once in place, it makes business sense to integrate the CRM with other systems to produce even more efficient results. When a CRM system is integrated with other decision support systems such as the enterprise planning system, the executive information systems, the product life-cycle management systems, to name a few, each of these functionalities creates a better flow of data in order to take informed decisions on strategies. With this new clarity, organisations can plan for production, sales and other functions, much better than when working in silos. This would definitely translate into better customer understanding, more successful sales strategies, leading to better revenues and higher profits (Anderson, 2006).

In summary, CRM implementations are found to be successful in organisations which collate greater data about their customers, and work out strategies to cater to their unique requirements (Kotler, 2002). Goldenberg (2002) adds the three most significant factors that make an implementation successful - people, process, and technology - each of these present challenges, but it is only by integrating these factors that the CRM system can run. The organisation needs to study the impact of the CRM system on its resources, its processes and even its customers, and manage all of these to make them one integrated whole – an entity that is ready to welcome the CRM system in its processes and use it to its maximum value.

#### **4. Research Methodology**

The objective of this paper is to study the process of CRM implementation in the software services companies. A case study methodology was adopted as it allows the researcher to ask over open-ended questions relating to what happened, why it happened and how things happened (Yin, 1994). The case study illustrates the experiences of CRM implementation at a Bangalore based software service firm. Due to the confidential nature of the study, the company's name has been changed to 'XYZ Corp' to mask company's identity. The data for the study was collected by several semi-structured interviews with members of the business development team within the company and by referring archival documents. The target audience for interviews were the Sales and Marketing Manager and Sales Director. The semi- structured interview methodology facilitated to gather data that was rich in detail (Miles & Huberman, 1994).

#### **5. Empirical Study: Case XYZ Corp**

XYZ Corp (name changed) is a Multicultural Global Technology & IT Services Company delivering business and technology solutions to a wide range of Fortune 500 companies and Small and Medium Enterprises (SME) globally. XYZ Corp's services portfolio includes Enterprise Business Services, Product Engineering and R&D Services, and Enterprise Information Security Services. Around 25 per cent of their clients are Fortune 500 companies and another 25 per cent are large global multinationals, remaining represent small and medium enterprises across various verticals. The future business strategies of XYZ Corp are to farm their existing customers and acquire new ones. With their Customer centric approach, they plan to have an unprecedented focus on Customers. They also intend to make an investment in innovation labs for incubating new business models, and innovating within their business (services, verticals). This will also include expanding their focus on new horizontal services and scaling that business to a much larger levels. XYZ Corp implemented CRM in 2008. All Sales and Customers details are now stored in their CRM system. XYZ Corp did not change its practices to fit the vendor's CRM system, instead the CRM system had to be

customised to suit their existing process. XYZ Corp has implemented Hosted CRM, accessible through web interface. The vendor provided training to both the end-users and the systems engineers. Training was also given to further customise the CRM system if need arises.

## **6. CRM Implementation at XYZ Corp**

The process of implementation at XYZ Corp started with the buy-in of the top management, facilitating the transformation of the company into a customer-centric organisation. This was not only an implementation need but also a business need – in the face of severe industry competition and a strategy to retain good customers. The biggest contribution and involvement in the CRM implementation process of the senior management was in terms of securing adequate financial and human resources. As mentioned earlier, the CRM implementation was kicked off with a thorough assessment of its readiness to successfully implement CRM. By developing a differentiated CRM strategy and aligning it with the company's new business strategy, plans were developed to implement a CRM project that broke down the CRM activity into smaller sub-projects. In order to start its actual implementation, the company focused on the following activities and aspects that were sub-parts of the whole CRM implementation.

New business plans were put in place to carry out the technological part of the CRM project. These plans aimed at providing advanced communication channels to the company's customers as well as to its employees. It also aimed at providing fast and differentiated software services and help leverage the level of performance and productivity for the company's employees. The overall implementation plan also took steps to improve the infrastructure and provide better customer support services. XYZ Corp signed a five-year contract with their CRM vendor to provide a consultancy service for CRM implementation. The contract also included technical support, since the project is strategic and involved a significant amount of investment.

Since the assessment had identified poor human resource skill levels as one of the bigger reasons for failure of the last attempt, one of the big aspects this time was proper training and buy-in from the employees. The strong resistance by the employees to adopt to the new changes in the work system was avoided this time. The learning process from past mistakes ensured that the employees understood that such resistance, alongside poor orientation and training programs for staff, contributed to the failure of the last CRM launch. This time, the entire resource structure was redesigned according to the assessment of its current capabilities. The vendor contract included developing training programs for the employees. These were aimed at leveraging their skills to the required level, so they there would be no problems in coping with the company's new customer-centric strategy. A series of training programs were launched at the company headquarters while other programs were organised outside the company.

The people requirement of a successful CRM implementation included the requirement of a industry best sales head, who could spearhead the implementation. This person also helped in positioning qualified skilled personnel especially in upper-level positions. To fight resistance to change by the personnel, the company applied a two pronged approach. Firstly, the staff was educated at all levels in planned training programs on different aspects of the new strategy. Thereafter the company offered a substantial redundancy for employees who did not make an effort to become a part of the new paradigm, or were unable to do so for any reason - either due to their lack of sufficient skills or due to their role in resistance to the new changes in the company's structure and culture.

Based on operational front-line functions (Sales & Marketing) and service delivery without a clear vision of focusing on the customer, the old structure would not have been able to support a CRM. For the CRM strategy to succeed this time around, it was mandatory to have a new organisational structure. Creating new departments and re- engaging some older functions within new departments was really required. So, in the new attempt, the CRM committee headed by the Chief Executive Officer (CEO) of the company controlled the force that supervised the implementation of CRM. In addition, each CRM project was owned by a certain department which had the responsibility for the technical implementation of the CRM project. The shared service department then had the responsibility for unifying the process of implementing CRM by the different departments. It was the shared services department that created the strategy for redesigning processes and procedures.

Based on the empirical study and literature review, a guide for a CRM program is outlined as depicted in Figure 1. Given the current economic and business scenario globally, any technology enabler that promises to add to business value, should be a strategic objective of any organisation. Customer retention, maintenance, loyalty and satisfaction are

the business mantras. Competition is cutthroat and every sliver of the market makes a difference. Every company needs data, a unique approach, and deep insight into the customer's mind and preferences. CRM programs can be an effective sales strategy to achieve all these objectives. As soon as organisations can map a benefit in terms of revenue and market share from their sales strategy, they should opt for a CRM implementation to put the strategy out in the market.

The implementation can be divided into three phases, Pre-implementation, Implementation and Post-implementation phase.

**Pre-implementation Phase:** This phase starts by outlining a plan for CRM system. Under the tutelage or at least support of Top Management, a CRM committee should be formed to kick start the process. This team should consist of representatives from different teams, which include the IT team, the back-office operations team, the resource allocation team, and the customer facing sales team. The committee should be responsible for requirement gathering, identifying a core team that would be accountable for the deployment and operation of the CRM system, getting sufficient budget allocated for the CRM project. They would also be responsible for monitoring the progress of CRM implementation. Here are some steps that need to be enforced:

- Planning and top down communications to make sure employee buy-in is in place
- Changes to processes, including structural changes, strategy changes should be done and communicated to the employees
- Readiness assessment needs to be done
- End user training is mandatory

Various CRM systems and vendors need to be evaluated on various criteria apart from the cost factor:

- Vendor experience and capability in aiding project execution as well as provide technical support during implementation.
- Vendor maintenance support and service
- Training and software upgrade support
- Integration functionality and compatibility with the existing systems (legacy systems, ERP system)

The CRM committee has to evaluate and select the one that is most suited to their IT infrastructure and business processes. Then a choice needs to be made between Installed & Hosted and between Integrated suite and Best of Breed CRM systems. Each has its advantages and disadvantages and the final choice lies on a couple of factors:

- For global office scenario, a hosted system works out more financially viable, along with the benefit of global access
- In case the organisation has legacy IT infrastructure and applications, it should opt for Installed systems to avoid compatibility issues.
- For companies that don't have a fixed number of users, a 'pay-as-you-go' arrangement will work best to tackle attrition issues.

**Implementation Phase:** In this phase, the three most important factors are people, process and technology, which have to be in place. These three components are inter linked and have to coordinate with each other for a successful CRM program. Getting employee and stakeholder buy-in is essential, as is getting the processes in place. The employees are to be informed well in advance about the CRM plans and process. The skill level of end users has to be developed so that they could use the new CRM system. As far as technology is concerned, the implementation strategy should include plans to prepare the IT infrastructure to handle the CRM system. The strategy should include end-to-end project execution plan, keeping the business objectives as the main focus. All the customer information collated earlier will also need to be migrated to the new system while implementation happens, and the process of cleaning and migrating needs to be done under vendor supervision, to avoid problems later. The data has to be sorted so that its analysis and reporting is aligned to the business strategy that the company has drawn up. The customer data stored in the CRM system needs to be managed efficiently. Data should be stored in a secure storage location.

While it makes business sense for most companies, the decision to integrate the ERP and CRM should depend ideally on the need of an organisation. Nevertheless, this integration always allows for best utilisation of the system for strategy purposes. Organisations with large back-office applications can streamline their operations with the integration of CRM and ERP. As a suggestion, it is better to choose the ERP vendor to procure the CRM, simply for the fact that they more often than not provide a seamless integration between these two systems. Top Management needs to

consider their financial feasibility before they decide on integration of their ERP with CRM.

Post Implementation Phase: Top Management is required to monitor the usage and utilisation of the CRM by end-users, ensuring that operations guidelines and processes are being followed. A clear CRM process should be outlined and the end-users should be informed and trained about the process to be followed while using the CRM. All data gathered through market research and customer interactions should be recorded and managed appropriately for data analysis to draw meaningful reports.

Once CRM is put into use, measuring the success of its operations helps gain clear insight into the efficacy of the process. In addition, it can reveal the effectiveness of the CRM process that has been drawn up as a part of the business development strategy. From time-to-time, the performance of CRM has to be measured to evaluate its effectiveness and a suitable framework has to be adopted to measure the performance of CRM. Additional to calculating the ROI, CRM performance can be measured by developing CRM-specific framework.

A good way to extract the best utilisation of the system is to plan reward programs to motivate employees to use CRM. Human Resource polices should include plans for motivating the employees to use CRM. Also, Training and Development (T&D) programs should be planned as an ongoing Human Resource Development (HRD) activity to train new hires, and train existing resources on new features added to the CRM system or for better utilisation of the existing features. Training programs should include CRM vendor trainings as well as trainings developed internally about the organisation's processes and plans. Also, technical personnel/ engineers needs to be trained on the technical aspects of the CRM system for trouble shooting any of the technical issues arising during usage and for future customisations (if required).

A significant factor here is that all the activities connected with the CRM need to be customer focused or customer centric, as the sales strategy. Also, right from the planning phase to the post implementation phase, all decisions made should be customer centric. It is also required that all the operational activities should be monitored by the Top Management. Only then the commitment and best usage will draw best results from the system, making the implementation a success. In the figure 1, all the elements listed are ultimately success factors for the CRM program. Each of them need to be treated as significant parameters/ factors for a successful CRM program, and ignoring any one can cause a weak link in the CRM system and may results in inefficiencies of the program.

### **Implication**

CRM Implementation is the most significant step in the company's decision to go ahead with a CRM system, it encompasses the entire nine-yards of readiness assessment, matching capability to market demands, and getting the people and process to change as per requirement. Most companies go at least three fourths of the way to ensure it is a success. It could be done in smaller modules as the case XYZ Corp did, or as a whole if the implementation is on a smaller scale, but the readiness assessment is what makes the difference.

This article outlines a guideline for a clear and flexible path for implementing CRM by identifying different phases of CRM implementation and linking these phases to CRM success factors. Firstly, it identifies the CRM components that will help provide organisations with a clear vision of accountabilities and responsibilities for implementing CRM within the organisational structure. To achieve success with CRM, companies are advised to take the time to understand the issues affecting people, process, and technology components individually. They also need to proactively manage the integration of all three components to ensure that the people, process, and technology mix is right during all phases of the CRM initiative. This study has confirmed the theory that people element is fundamental and significant in any CRM implementation. Change process to be customer centric is the way forward for the success of CRM and business objectives. Top Management needs to take "ownership" of the complete program.

### **Conclusion**

The foremost requirement of a successful CRM practice starts at the top. The top management of a user organisation have to be the first evangelist for the concept. The mindset for adapting processes and people to implementation of a CRM has to flow down from the top, making it a company wide effort, with active support from senior management. Executives in decision- making positions need to be actively involved in changing processes to make them more

customer-centric and cross- functional. This would help facilitate putting in place new processes that use technology better. It would also help in instilling disciplined cooperation and collaboration in carrying out the cross-functional processes. The system would need proper training of employees in order for them to become more customer-centric, thereby adding value to their customer interactions. This would also help enhance their market and customer related skills, and thus motivating them to achieving CRM goals.

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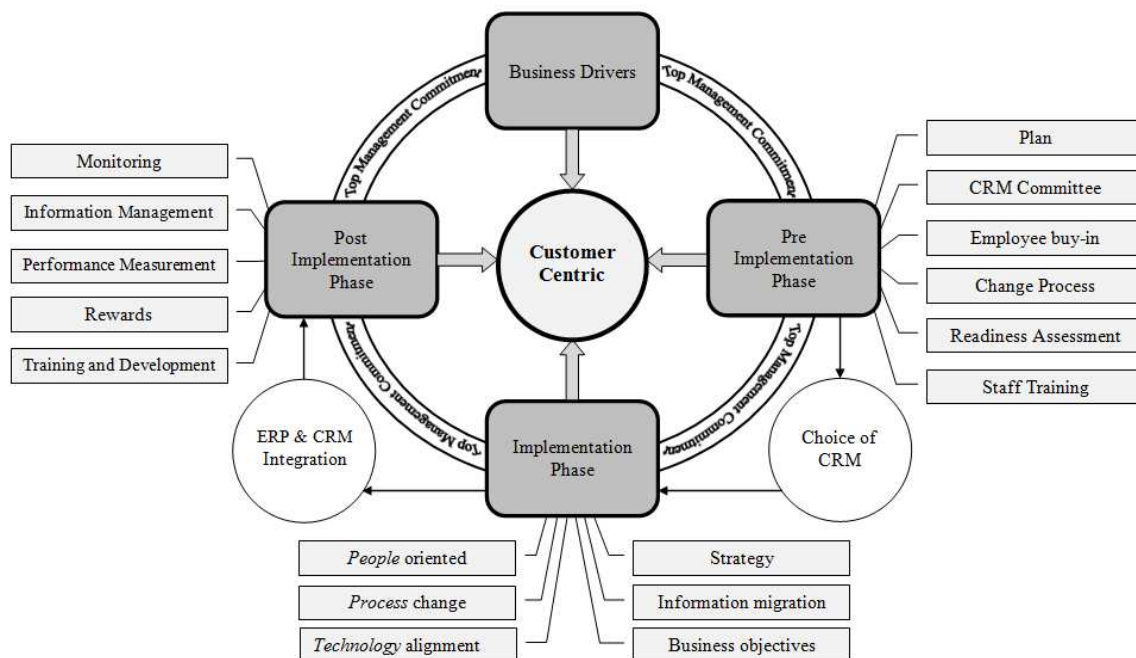


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**Figure 1: A guideline for a CRM program**

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